PROMPTT®
SYSTEM

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Welcome

TrigPoint Solution's automated PROMPTT® System provides a modern day approach to maximizing rig asset and personnel performance. An easy to use, interactive, mobile system ensures compliance to your corporate tracking, maintenance, and safety procedures by utilizing proven RFID (radio frequency identification) technology.

The PROMPTT® System is easy-to-use and highly configurable to your exact requirements. The purpose of this help system is to provide instructions for navigating the PROMPTT® System web site. In the event you need personalized assistance, please do not hesitate to contact us.

The PROMPTT® System

The PROMPTT® System web interface is used to:

- Set up components, inventory, locations, and users
- View components, inventory, tasks, task lists, safety activities, checklists and work orders
- Research components and task histories
- View and modify material transfer and location information
- View alerts and notifications
- Export site information into spreadsheets and other file formats
- Run and view reports

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General Information

How to Read This Document

The information in this user manual follows the basic PROMPTT® system menu. The sections are organized with high-level topics like Assets or Safety, followed by the consecutive sections describing which building blocks and elements are used to create and maintain these functions.

A section typically starts with a method to review the existing data. The subsequent sections explain the methods to create and maintain that data.

To avoid repetition, many of the sections include hyperlinks to other sections. These can be clicked to transfer the user to the referenced section.

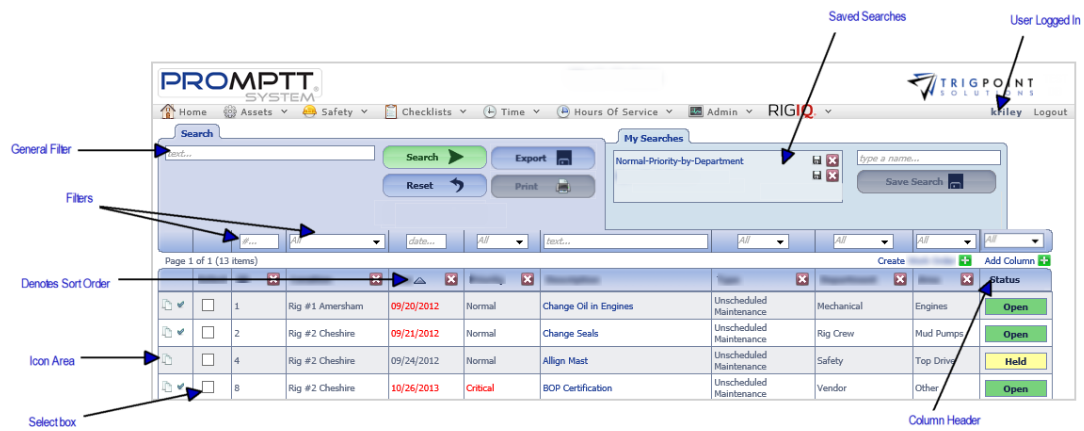
Basics

Within the PROMPTT® system, fields marked with an asterisk (*) are required fields.

When an ellipsis (…) is displayed in the application, it indicate that there is more data than what can be initially shown on the screen.

Search Pages

Search pages are used throughout the PROMPTT® System, allowing the user easy access to view the data. The following describes the standards for all search pages; see the corresponding section for the particulars of an individual search page.



Search page

- Search pages are initially opened with no data presented. The Search button must be clicked to display the data.
- Filters are used to determine what data will be displayed on the search page. Leaving the filter blank will show all available data.
- The last filter used is saved during a login session. When re-entering a search page, the data will be retained from the previous search.

- To search all of the columns for a given value, enter the value in the general filter at the top left of the page. If the value is found in more than one column, the system will ask which column to use.
- Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order.
- Columns that have been used to sort the data will display an up or down arrow to the right of the column label.
- To clear the filters, click the Reset button. The Search button will need to be clicked to display the data.
- To export the data displayed on the page to an Excel file format, click the Export button.
- On some pages, additional columns can be added. To add columns to a search page, click on the Add icon for Add Column.

    A list of detail definitions that are assigned to the entity is displayed.

    Select one or more of the details to be shown. Click the OK button to add the details to the search page or click the Cancel button to return to the search page with no changes.

    The columns are added to the search page. Use the horizontal scroll bar, or the left and right arrows, to move back and forth across the page.
- Search pages that can have columns added to it can also have columns deleted from it. Click the Delete icon to the right of the column label to delete the column.
- Most search pages that can have columns added to it can also have columns moved around. Click on the column title and drag the column to the desired position.
- Filters can be saved permanently in a Saved Search.

To create a saved search

Enter the search criteria.

Click the Search button.

Enter a name for the saved search.

Click the Saved Search button.

To use a saved search

Click the saved search name in the Saved Search pane.

To change a saved search

Enter the search criteria.

Click the Search button.

Click the Save icon to the right of the saved search.

To delete a saved search

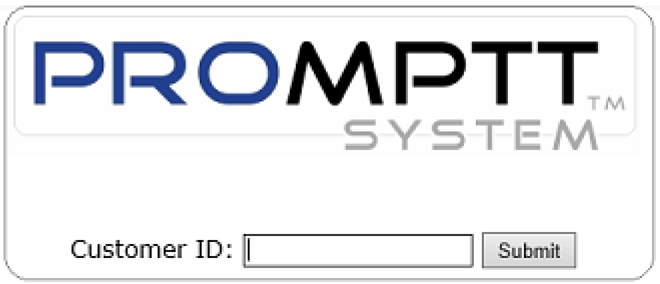
Click the Delete icon to the right of the saved search.

- To change pages on a search page, click on the page number or click the left or right arrow next to the page numbers. Clicking the left double arrow will display the first page and clicking the right double arrow will display the last page.

Logging On

In the browser address bar, type the PROMPTT® web address, http://www.myromptt.com.

The Customer Login page is displayed.



Customer Login page

Or

In the browser address bar, type http://www.myromptt.com/*nnnnnn* into the address bar, where *nnnnnn* is your customer number.

In the Customer ID box, type your customer ID and click the Submit button

The Login page appears.

Login Page

Enter the following information

> **Username** Enter the user's name.
>
> **Password** Enter the password. The password is case sensitive.

If the browser is set to save user names, click on the name field in the drop-down list to select the user name. This does not apply to the first time logging in.

Click the Login button.

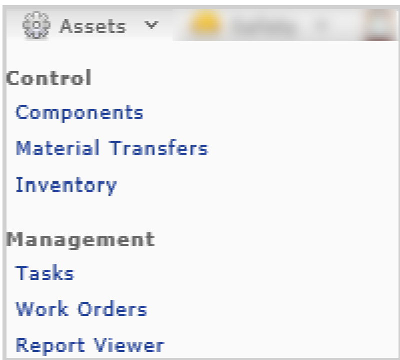
The Home page is displayed.

The Menus

The Main Menu, located at the top of the page upon logging in, consists of different submenus based on the user's authorization level. These submenus allow you to navigate throughout the website.

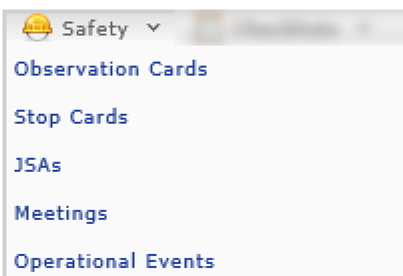
- **Home**: The Home page is the starting point for every user in his or her daily work. It summarizes the most important information for the user's daily business and provides access to the most frequently used tools.

- **Assets**: The Assets menu contains Asset Control and Asset Management.



Assets Menu

- **Safety:** The Safety menu includes Observation Cards, Stop Cards, JSA's (Job Safety Analysis), Meetings, and Operational Events.

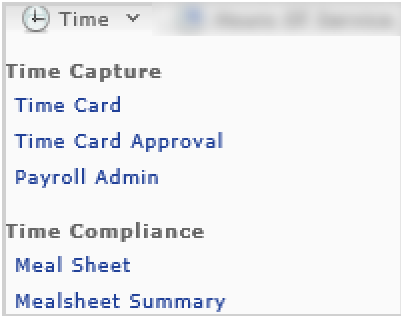


Safety Menu

- **Checklists**: The Checklists menu consists of Checklists and Checklist Execution.

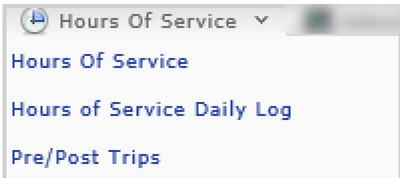
Checklists Menu

- **Time:** The Time menu includes Time Capture and Time Compliance.



Time Menu

- **Hours of Service:** The Hours of Service menu contains the options to tracks pre and post trips.



Hours of Service Menu

- **Admin:** Enables administrative tasks, such as creating a user, location, components, and inventory items and setting up tasks.

Admin Menu

Admin is only available if the user has been assigned the "Web Admin" role.

- **RigIQ:** This menu consists of RIGIQ Data Visualizations and Data Analysis.

RIGIQ Menu

Menu options may vary depending on the individual user's security.

Icons used on the Website

Icon	Name	Action
	Delete	Deletes an object
	Add	Adds an object
	Notification	Indicates a notification is available for the object
	Lightning bolt	Execution
	Paper clip	Indicates there is an attachment associated with the object.
	Pencil	Displays details and edits the object
	Notes	Indicates there is a note associated with the object.
	Printer	Prints
	Right double arrow	Goes to the last page
	Left double arrow	Goes to the first page
	Left arrow	Goes to the previous page
	Right arrow	Goes to the next page
	Details	Displays the details page of an object
	Family	Indicates that there are objects associated with the object.
	Text	Allows text entry
	Copy	Copies the object
	Checkmark	In components, indicates that there is a task available for the component. In work orders, closes the work order.
	Save	Saves
	Reject	Rejects a task, task group or task component.
	Image	Indicates there is an image associated with the object.

Icon	Name	Action
	Information	Displays information
	Back	Returns to the previous page
	Depend	Highlights questions that depend on this question.
	Dependency	Highlights dependent questions
	Next	Moves to the next
	Previous	Moves to the previous
	Add comment	Enables the entering of a comment
	Add Work Order	Enables the entry of a work order
	Down Chevron	Expands the object
	Up Chevron	Collapses the object
	Sign Out	Sign the user out
	Sign In	Sign the user in.

Table 1 -Web Icons

Using Reports

Reports are used to display, export, and print information from the PROMPTT® System.

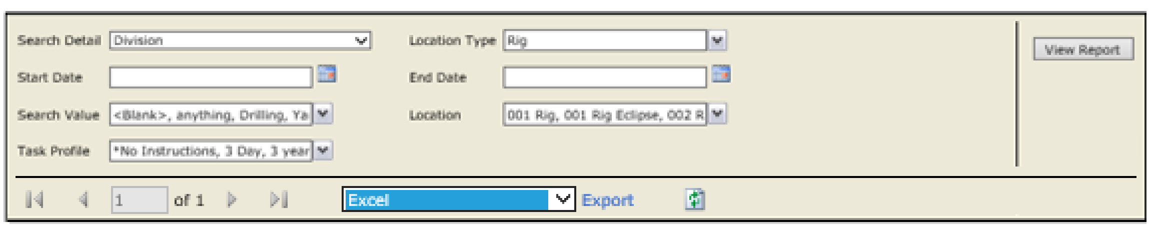
To view a report, the Reports content brick needs to be added to the Home Page. See the Home Page section on how to do this. The reports displayed in the Reports content brick are unique to each customer.

Reports List

From the Report List, click on the blue link for the report to be viewed.

A filter page will be displayed.

For example, after selecting the Compliance Reports Data the following filter page would be displayed.



Compliance Report Data Filter

From the filter page, enter the search criteria. The Compliance Report Data has seven filters that can be used to determine the search results; Search Details, Location Type, Start date, End Date, Search Value, Location, and Task Profile. The Start Date and End Date filters are required to run the report. The remaining filters are optional.

Click on the View Report button.

The Report will be displayed.

From this page, you have the option to export or print the data from the report.

Reports can be exported to an Excel or Acrobat (PDF) file. This is done by selecting a format from the Export drop-down list and then clicking the Export link.

A dialog box is displayed, asking if you want to open or save the PDF or spreadsheet.

Click the Open button to open the file, click the Save button to designate a location to save the file, or click the Cancel button to return to the page without saving or opening the file.

Home Page

The home page is the starting point for every user in his or her daily work. It summarizes the most important information for the user's daily business and provides access to the most frequently used tools. Some content is dynamic (*Task List Activity*, for example, is changed daily) while other content is relatively static (*Standard Favorites*, for example).

The home page is user configurable; the content of the home page can be tailored to the needs of the corresponding user and role. The user has the choice to place the content blocks freely anywhere on the home page.

There are three types of content blocks that can be added to the Home page, the Standard Content, the RIGIQ Data Visualization Content, and the RIGIQ Data Analysis Content.

Standard Content

The Standard Content consists of nine different content blocks.

- The **Recent Safety Activity** content block shows the number of checklists, JSAs, stop cards, hazard hunts, and operational events that have been completed for the current date.
- The **Device Activity** content block shows the synchronization activity of all devices. It contains a link to the Device Activity screen.
- The **Work Orders** content block shows open work orders for the user's assigned location. The Work Order list provides information about each work order, including its due date, priority, location, department, area, and description. Clicking on the work order information will open the Work Order page. Users can create a new work order by clicking the Create Work Order button.
- The **Standard Favorites** content block can have links to the Component Search, Observation Cards, Change Password, and the Download for the PC Application. It also has links to user specific saved component searches.
- The **Open Task List** content block shows all the open task lists for the user's assigned location. The Task List provides information about each task including its name, status, and due date. Clicking on the task list name brings up the tasking for the selected task.
- The **Subscribed Notifications** content block displays all the notifications to which the user has subscriptions set to view.
- The **Time** content block will show users currently on tour if meal sheets are being used. If the environment uses time and attendance, the user will have the ability to access their time card. If the user is a supervisor, the content block will display any of the supervisor's users that are logged in.
- The **Task Summary** content block displays time specific task compliance for the locations the user is authorized to view.
- The **Reports** content block provides links to commonly used reports and is a subset of all available reports.

RIGIQ Data Visualization Content

The RIGIQ Data Visualization Content consists of eleven RIGIQ dashboards that can be used as content blocks. These dashboards are dynamic and are refreshed daily. The underlying data for any data point can be seen by hovering the cursor over the point.

- The **Location Performance** content block shows assets and components that were recently scanned or not scanned.
- The **Monthly Compliance** content block displays a bar chart of tasks completed versus total tasks by month.
- The **Overall Performance** content block shows component transfer and scanning activity.
- The **Rig Compliance** content block shows a heat map of maintenance compliance by rig. The higher the task expired percentage, the larger and darker grey the locations appear.
- The **Safety Monthly Performance** content block shows a bar chart of safety activities performed.
- The **Total Safety Activities** content block shows a line chart of safety activities by month.
- The **Total Safety Activities by Rig** content block shows the number of safety activities for each rig for the period.
- The **Total Safety Activities Summary** content block shows a breakdown of safety task types for the period.
- The **Work Order Monthly Trend** content block displays a line chart of the total cost of work orders versus the number of work orders over time.
- The **Work Order Rig Performance** content block displays a scatter chart of the total cost of work orders versus number of work orders by rig
- The **Work Order Top 10 Most Expensive Component Types** content block displays a bar chart of the top 10 most expensive component types.

RIGIQ Data Analysis Content

The RIGIQ Data Analysis Content consists of seventeen RIGIQ dashboards that can be used as content blocks. These dashboards are dynamic and are refreshed nightly.

- The **Completed Percentage** content block displays a color intensity chart of task completion by category.
- The **Component Map** content block displays a map of all the components that have been scanned with GPS coordinates enabled.
- The **Maintenance Score** content block shows the score and total Code 8 hours per rig.

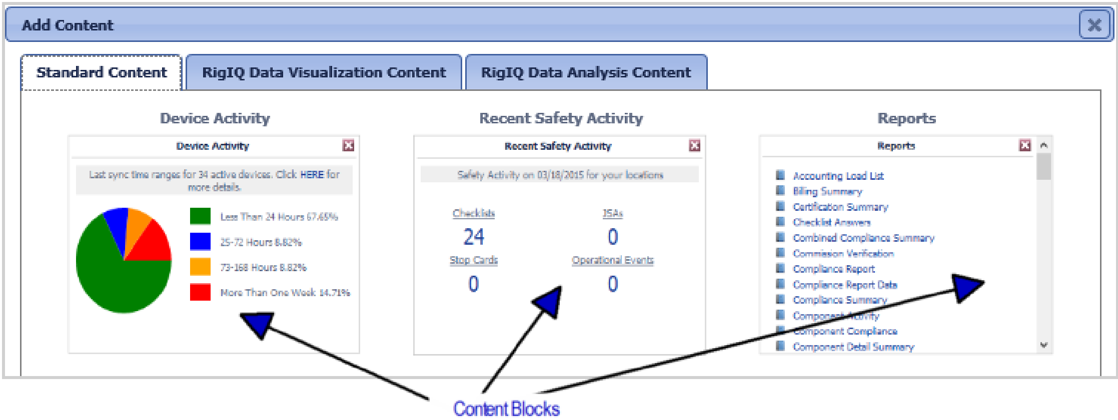
- The **Maintenance Score Expired Percent** content block shows the score, critical maintenance task %, overall maintenance task expired %, and the expired tasks deltas.
- The **Maintenance Score Rig Level** content block shows the score of an individual rig.
- The **Maintenance Score Rig Level Open Tasks and Work Orders** content block shows a list of work orders and tasks by priority level for each rig.
- The **Maintenance Score Rig Level Weekly Performance** content block shows the score, expired %, outstanding work orders, and code 8% at a rig level.
- The **Maintenance Score Work Order Cost** content block shows the total cost of work orders for the prior seven days for each rig.
- The **Rig Compliance by Rig** content block shows a scatter plot of maintenance task expired percentage versus code 8%.
- The **Monthly Compliance** content block shows a line graph of maintenance task expired % versus code 8% by month.
- The **Rig Summary by Rig** content block shows bar charts of maintenance tasks expired % and key performance indicators for all rigs.
- The **Safety Activity Types** content block shows a bar chart of safety activity types by month.
- The **Safety Monthly Performance** content block shows a line chart of safety activities versus code 8% by month.
- The **Safety Rig Performance** content block shows a scatter plot of rig-level safety activities versus code 8%.
- The **Work Order Rig Performance** content block displays a scatter plot of total work orders versus code 8% for each rig.
- The **Work Order Rig Summary** content block displays bar charts of work orders and key performance indicators for all rigs.
- The **Work Order Monthly Performance** content block displays a line chart of work orders versus code 8% by month.

Creating a Dashboard Definition

When a user initially logs into the PROMPTT® system they will see the default dashboard in the home page. If no content blocks have been added to the default dashboard, the user will see the text **Add Content or Open a Dashboard**. This default dashboard definition is then saved with the user's own dashboard. The name of the dashboard is displayed in the upper left-hand corner of the home page. Any changes that the user makes after the initial log in will be to the user's dashboard not the default dashboard.

To add create or change the dashboard definition click the Add icon for the Add Content.

The Add Content dialog box is displayed with the Standard Content tab displayed.



Add Content dialog box

Click on a content block to add it to the home page. This procedure can be repeated as many times as needed.

To add RIGIQ content blocks, click on one of the RIGIQ tabs and click on the content block to be added.

Once all of the content blocks have been added to the home page, the user can drag and drop the content blocks to place them in any order.

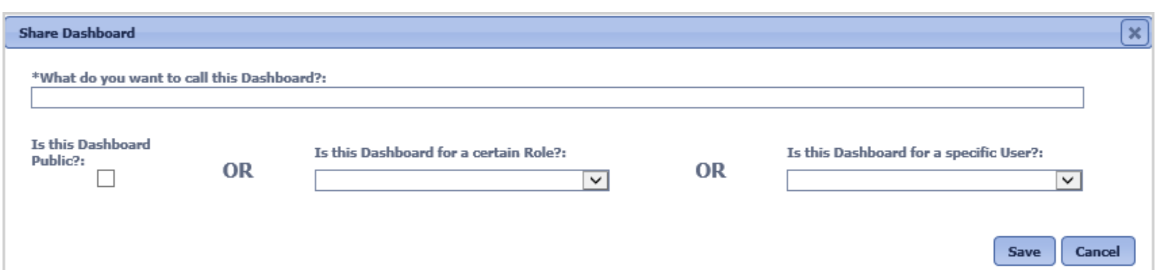
Content blocks can be deleted from the home page by click the red Delete icon in the upper right-hand corner of the content block.

Sharing Dashboard Definitions

Once a dashboard has been configured, it can be shared with specific users, roles or all users. The configuration of a home page is called the Dashboard Definition.

Click the Add Icon for Share Dashboard.

The Share Dashboard dialog box is displayed.



Share Dashboard dialog box

Enter the following information.

What do you want to call this Dashboard? Enter a name for the dashboard definition of up to 200 characters.

Answer one of the following three questions.

Is this Dashboard public? Click the checkbox if this dashboard definition is to be shared with all users in the system.

Is this Dashboard for a certain Role? Select a role from the drop-down list of roles if this dashboard definition is to be shared with a specific role.

Is this Dashboard for a specific user? Select a user from the drop-down list of users if this dashboard definition is be shared with a specific user.

Click the Save button to save the dashboard definition and return to the Home page, or click the Cancel button to return to the Home page without saving the definition.

Using Dashboard Definitions

A dashboard is a dashboard definition that has been added to the user. When the dashboard definition has been completed, the user can then specify which definition they will use as a dashboard.

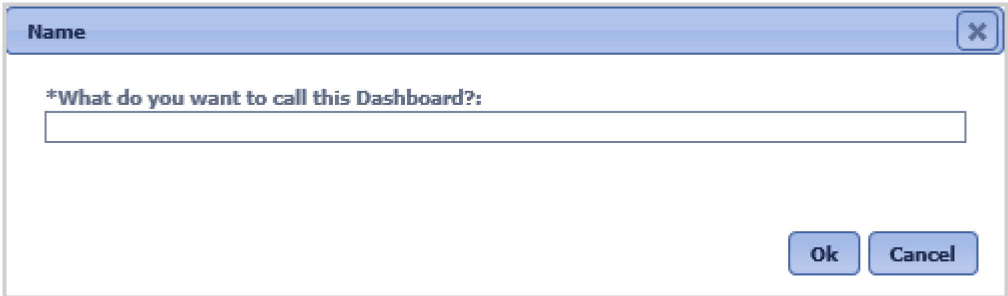
Click the Add icon for the Open Dashboard

The Open Dashboard dialog box is displayed.

Open Dashboard dialog box

Click on a dashboard definition.

The Name dialog box is displayed.



Name dialog box

Enter a name for the dashboard of up to 200 characters.

Click the Ok button to save the changes and return to the Home page with the dashboard loaded, or click the Cancel button to return to the Open Dashboard dialog box.

The user can change the current dashboard by clicking the name of any of the dashboards in the My Existing Dashboards pane.

Assets

Components

Components are at the heart of the PROMPTT® System. They represent a company's assets. The PROMPTT® System can be used with any type of equipment that is tracked, maintained, or checked. Components can have an unlimited amount of user-created details associated with them. The PROMPTT® System's tasking, work order, and checklist modules update these details automatically or the user can update them manually. Templates are used to create Components easily and consistently. Components can be created either in the field using a Handheld device or through the website.

Reviewing Components

From the Main Menu, select Assets -> Components.

The Component Search page appears.

To see components by a location type, select a type from the Location type filter.

To see components by a location group, select a group from the Location group filter.

Use one or more of the filters to determine which of the components will be displayed. Leaving the filter blank will show all components.

Select one or more locations from the **Location** filter drop-down list.

Select one or more sub locations from the **Sub Location** filter drop-down list.

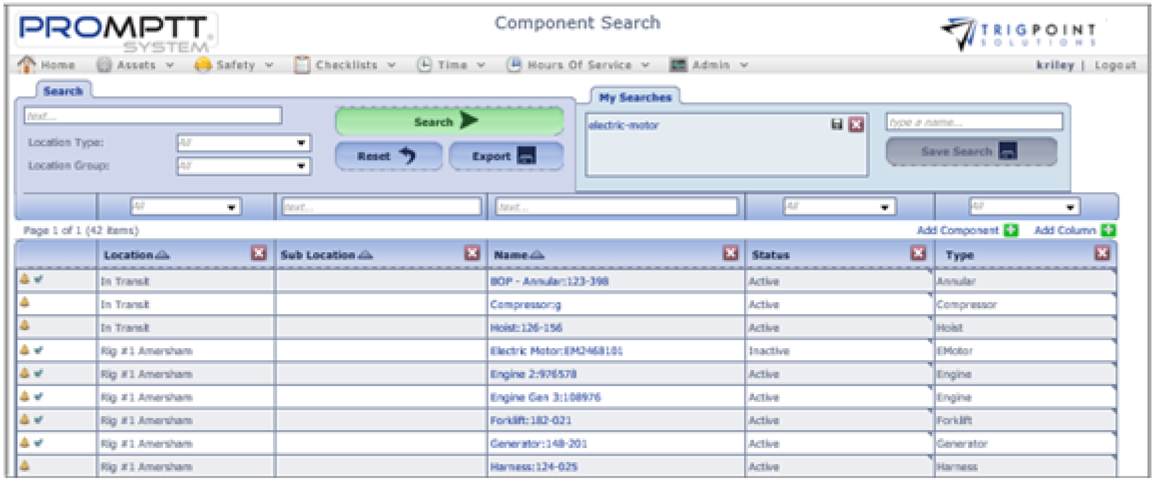
Enter a name or a partial name of a component in the **Name** filter.

Select one or more statuses from the **Status** filter drop-down list.

Select one or more Types from the **Type** filter drop-down list.

Click the Search button.

The results of the search are displayed.



Component Search page

Columns can be moved by clicking and holding on the name of the column then drag and drop to the chosen location.

A Bell icon indicates that there is a notification for the component.

A Paperclip icon indicate there is an attachment to the component

A Checkmark icon indicates that there is a task available for the component.

The Search Pages section contains additional information about search pages.

Reviewing Component Details

When you click a component name from the Component Search page, the Component Details page for that component appears. The Component Details page contains a header section and nine tabs. The nine tabs are Details, Attachments, Instructions, Scan History, Component History, Transfer History, Work Orders, Checklists, and Map.

- The Header section of the Component Details page displays the Standard Details, the Component Hierarchy, and the Notes for the component. The **Standard Details** provides the name, type, current location, current sub location, status, and parent name of the component. Components grouped together are called a family. The **Component Hierarchy** shows a map of the component's family. The **Notes** show any notes attached to the component and allows entry of new notes.

- The **Details** tab displays the component details, date the detail value was last updated, and who did the update. If the detail definition is set to allow editing, the value can be changed using the inline editing feature.

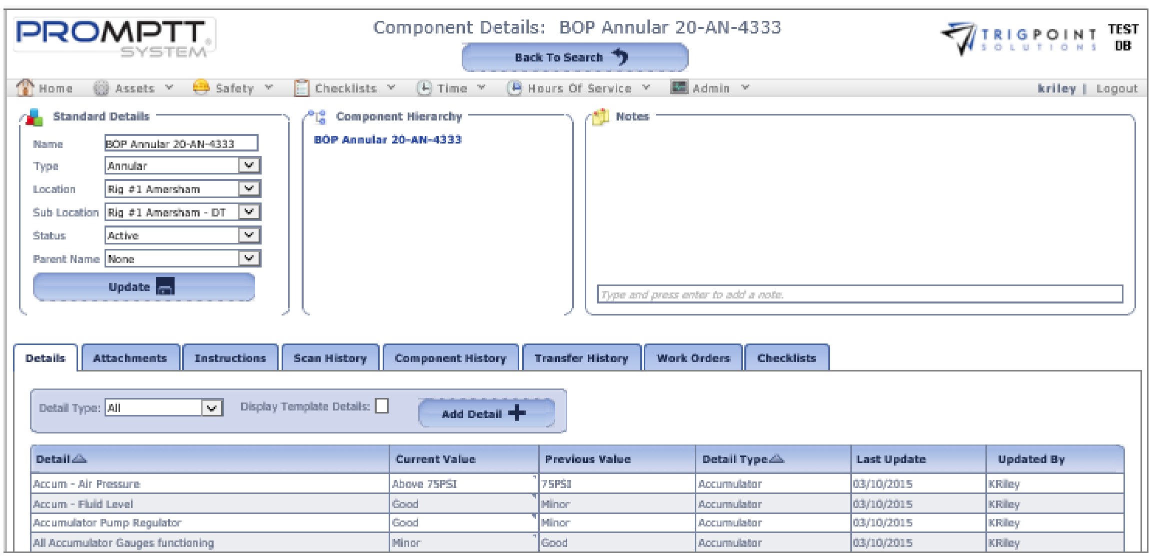
- The **Attachments** tab displays any images or attachments that have been associated with the component or the component type. The attachments tab shows the type of attachment and if the image will synchronize to the Handheld.

- The **Instructions** tab displays the instructions assigned to all components, the component type, or the component.
- The **Scan History** tab displays the history of when the component was scanned, where the component has been scanned, who scanned the component, what task was used to scan the component and the Tag ID of the component. The scan history can be transferred to another component from this tab.
- The **Component History** tab shows the changes made to the component, where the component was changed, what component detail was changed, the value before it was changed, the value to which it was changed, who changed the component, and when they made the change.
- The **Transfer History** tab shows the transfer history of the component, including the Material Transfer ID, the location the component was transferred from, the location the component was transferred to, the type of transfer, the shipping reference number of the transfer, the Attention To of the transfer, who made the transfer, and when the transfer took place.
- The **Work Orders** tab presents a list of work orders that include the component. It shows the ID, description, department, due date, priority, and status of the Work Order.
- The **Checklists** tab displays any checklist instances that used the component. It shows the checklist ID, the name, the assignment, the leader, and the date that the checklist instance started.
- The **Map** tab displays the GPS coordinates for the component where it was last scanned.

Modifying the Standard Details

After performing a component search, click on the name of the component that is to be modified.

The Component Details page is displayed.



Components Detail page

In the upper left-hand corner is the Standard Details pane. From here, enter a new name, if needed, or select a new value from the drop-down lists. Click the Update button to save the change.

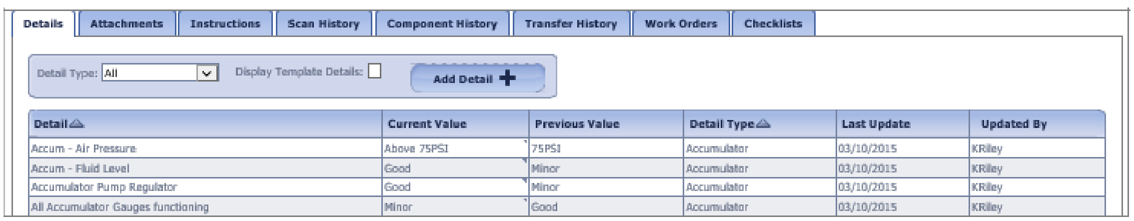
A component can be setup with a parent component in the standard details. This is how families are built. A parent component can also have a parent. The family hierarchy is displayed in the Component Hierarchy pane to the left of the Standard Details pane.

To enter a note, click on the note and enter the text, pressing the Enter key will save the note.

Creating and Modifying the Details

After performing a component search, click on the name of the component that is to be modified.

The Component Details page is displayed. The details associated with the component are shown in the Details tab, sorted by Detail Type and then by Detail.



Details tab

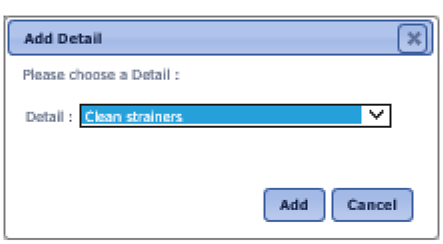
To limit the details to a specific type, click on the Detail Type filter and select a detail type. To only display template details, check the Display Template Details box.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Only details that have the editable flag set to “Yes” in the detail definition can be modified. Details that have this flag set to “Yes” have a small triangle in the upper right-hand corner of the data cell in the current value column. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list, and press the Tab or Enter key to save the change. Clicking on another data cell instead of pressing the Tab or Enter key cancels the change.

To add a detail, click the Add Detail button

The Add Detail dialog box is displayed.



Add Detail dialog box

Select a detail from the drop-down list and click the Add button to save the detail and return to the Details tab, or click the Cancel button to return to the Details tab without saving.

Creating and Deleting Attachments

After performing a component search, click on the name of the component that is to be modified.

The Component Details page is displayed.

Click on the Attachments tab

The attachments associated with the component and component type are displayed.

Attachments tab

To upload an attachment, click the Add icon for the preferred Attachment pane.

The Add Attachments dialog box is displayed.

Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

Enter the Name and select the type of attachment.

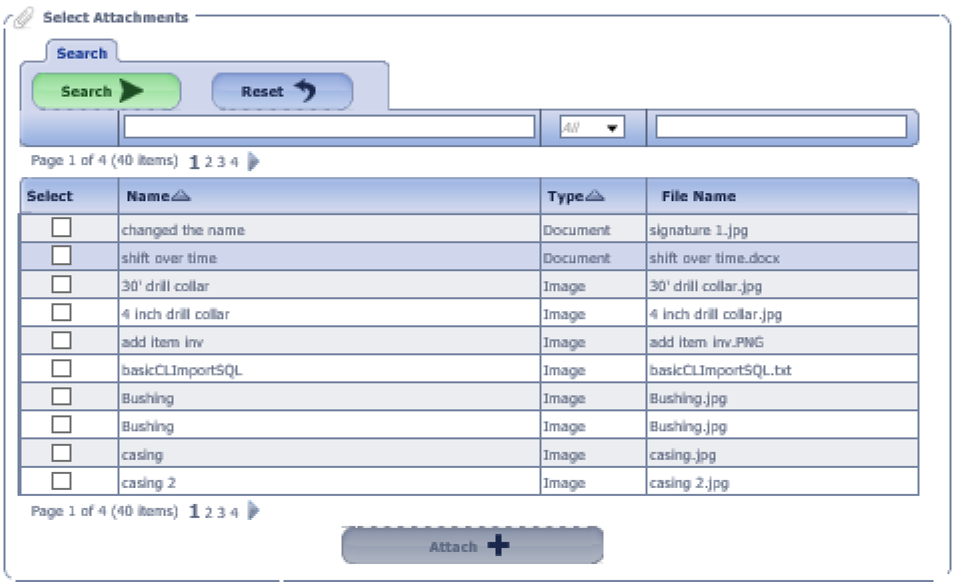
Check the On Handheld box if the attachment is to be sent to the Handheld.

Click the Upload button. Click the Browse button to add another attachment, or click the Close button to return to the Attachments tab.

The attachment is now associated with the component or component type.

To add an existing image, click the Select tab.

The Select Attachments dialog box displays a list of attachments.



Add Attachments dialog box – Select

Use one or more of the following filters to determine the attachments to be displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for any attachments on the page that are to be added to the component or component type, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

The attachment is now associated with the component or component type.

The checkbox to Synchronize to the Handheld can be modified in the Attachments for this Type pane or the Attached to This Component pane. If the box is checked, the image will be sent to the Handheld. If it is unchecked, the image will not be sent. Please note that the size of the images that can be synchronized to the Handheld is user defined in the Control Table.

To delete an attachment, click the Delete icon to right of the attachment.

Scan History tab

After performing a component search, click on the name of the component that is to be modified.

The Component Details page is displayed.

Click on the Scan History tab.

Scan History tab

Use one or more of the following filters to limit the number of components to be displayed: Date, Location, User, Scan Skipped, Task Profile, or Tag ID. Leaving the filters blank will select all scan history.

Click the Search button to perform the search.

The results matching the search criteria will be displayed.

To clear the filters and return to the original results, click the Reset button.

To export the data displayed on the page to an Excel file format, click the Export button.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. Columns that have been used to sort the data will display an up or down arrow to the right of the column label.

Reassigning Scan History

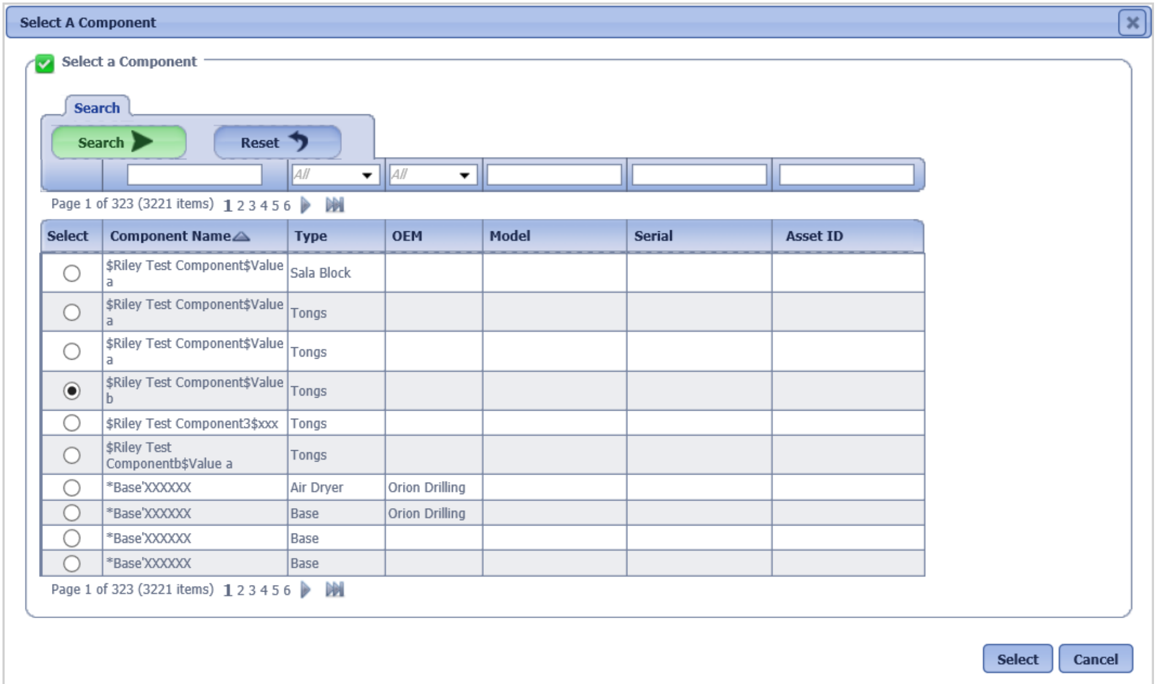
From the Scan History tab, click on the Tag ID that is to be reassigned to another component.

The Component Tag Reassign dialog box is displayed.

Component Tag Reassign dialog box

Click Add icon to select the component to which the scan history is be reassigned.

The Select a Component dialog box is displayed.



Select a Component dialog box

Use one or more of the following filters to limit the number of components to be displayed: Component Name, Type, OEM, Model, Serial, or Asset ID. Leaving the filters blank will select all components.

Click the Search button to perform the search.

The system displays the lists of components that match the entered search criteria.

To clear the filters and return to the original results, click the Reset button.

To export the data displayed on the page to an Excel file format, click the Export button.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. Columns that have been used to sort the data will display an up or down arrow to the right of the column label.

Click the radio button for the component and click the Select button to select the component, or click the Cancel button to return to the Component Tag Reassign dialog box without selecting a component.

After selecting a component, click the Reassign button to reassign the scan history to the selected component. The scan history for the selected Tag ID will be removed from the original component to the new component. The Cancel button can be clicked to return to the Scan history tab without reassigning the history.

Material Transfers

Transfers are used to move components, inventory, and non-inventory items in and out of locations and record their specific movements.

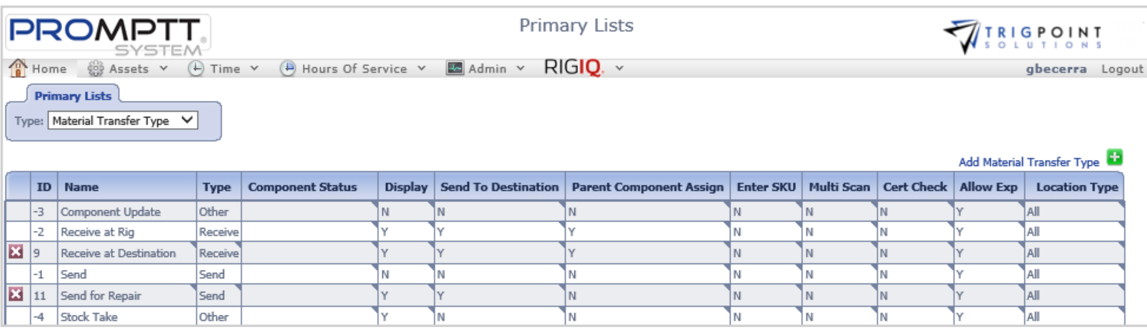
Material Transfer Type

Material Transfer Types are used to define the different types of transfers that the PROMPTT® System supports. The Material Transfer Type is maintained in the primary lists. The Material Transfer Type determines if a transfer is a ship or receive, if the transfer will go directly to the destination or go to In Transit location, if the user will be prompted to assign a parent to a component, if multi scan is used, and if certification checks will take place.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

Select Material Transfer Type in the Type drop-down list.

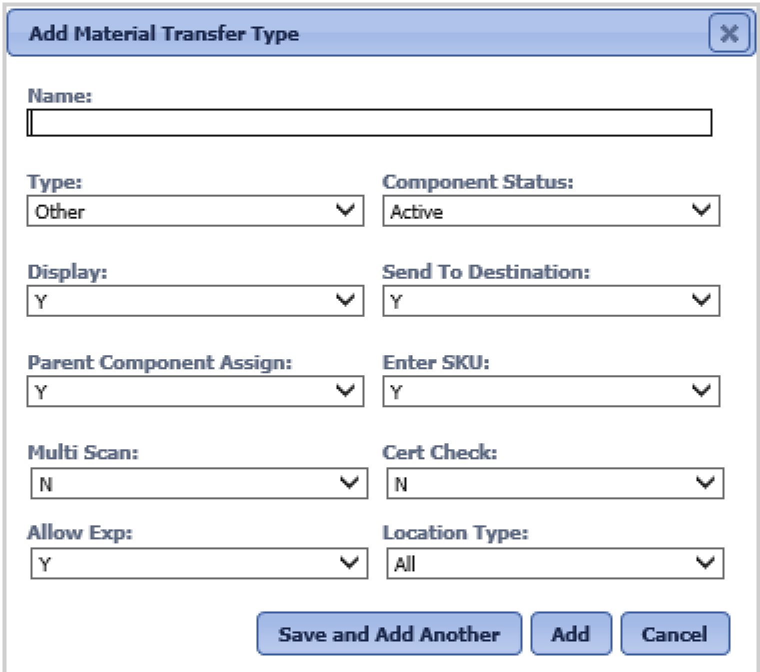


	ID	Name	Type	Component Status	Display	Send To Destination	Parent Component Assign	Enter SKU	Multi Scan	Cert Check	Allow Exp	Location Type
	-3	Component Update	Other		N	N	N	N	N	N	Y	All
	-2	Receive at Rig	Receive		Y	Y	Y	N	N	N	Y	All
	9	Receive at Destination	Receive		Y	Y	Y	N	N	N	Y	All
	-1	Send	Send		N	N	N	N	N	N	Y	All
	11	Send for Repair	Send		Y	Y	N	N	N	N	Y	All
	-4	Stock Take	Other		Y	N	N	N	N	N	Y	All

Primary Lists page – Material Transfer Type

Click the Add icon for Material Transfer Type.

The Add Material Transfer Type dialog box is displayed.



Add Material Transfer Type dialog box

Enter the following information.

Name The name of the transfer type as it will appear when entering a transfer on the Handheld or in the web application. Enter a Name of up to 50 characters.

Type The type of transfer. Select Send, Receive, or Other from the drop-down list. Optional.

Component Status The component will be updated to this status when the transfer is processed. Select a component status from the drop-down list.

Display Determines if the transfer type will be displayed in the Material Transfer Type drop-down list when creating a transfer. Select Y for Yes, or N for no from the drop-down list, this will default to Y.

Sent to Destination Determines if the components or inventory items will be transferred directly to the destination, or if they will be transferred to the In Transit Location.

When this is set to N, the components will be transferred to the In Transit location and the item will be moved to the Sent Quantities of the source location when on a Send transfer. On a Receive Transfer, the component will be moved from the In Transit location and the items will be moved from the Sent Quantities of the source location.

When this is set to Y, the components will be transferred directly to the destination location and the items will moved directly to the available or unavailable quantities of the destination location when on a Send transfer. On a Receive transfer, the components will be moved directly from the source location to the destination location and the inventory items will moved to the available or unavailable quantities at the destination location.

Select Y for Yes, or N for no from the drop-down list, this will default to Y.

Parent Component Assign Controls if the user will be prompted to assign the component to a family when performing a Receive transfer on the web on Handheld application. Select Y for Yes, or N for No from the drop-down list, this will default to Y.

Enter SKU Reserved for future use.

Multi Scan Determines whether the user will be able to scan components on the handheld singly or in a group. When this is set to Y, the user will be able to scan component tags in a group. The user will not be prompted to assign the component to a family when this is set to Y. When it is set to N the user will only be able to scan components singly. Select Y for Yes, or N for No from the drop-down list, this will default to N.

Cert Check Determines if a check of the component's certification date to ensure it is within the specified tolerances should be performed in the Handheld applications. When this is set to Y, a check will be performed. When this is set to N, a check will not be performed. See Setting up Certification Checks. Select Y for Yes, or N for No from the drop-down list, this will default to N.

Allow Exp Determines if a component that is has an expired certification can be added to the transfer. Setting this to Y will allow the component to be added, setting it to N will stop the user from adding the component to the transfer. Select Y for Yes, or N for No from the drop-down list, this will default to Y.

Location Type Location types limit the locations for which the transfer type can be used. Select a location type from the drop-down list, or select All to be able to use the transfer type with all locations, this will default to All.

Click the Save and Add Another button to add another transfer type, click the Add button to save the transfer type and return to the Primary Lists page, or click the Cancel button to return to the previous page without saving any changes.

Material transfer types are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

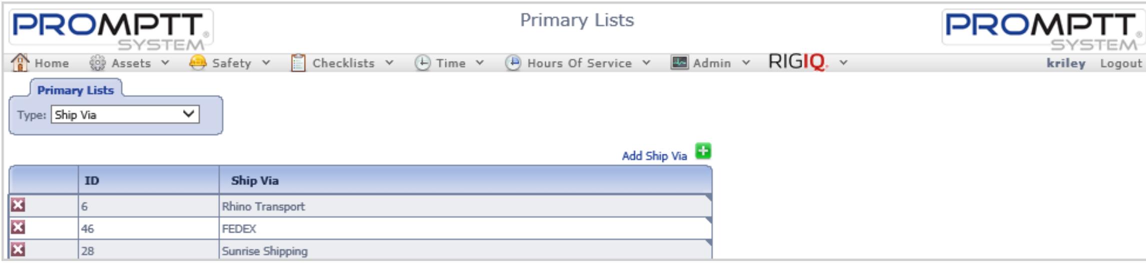
Ship Via

The Ship Via is used to maintain a consistent list of shipping vendors. Ship Vias are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

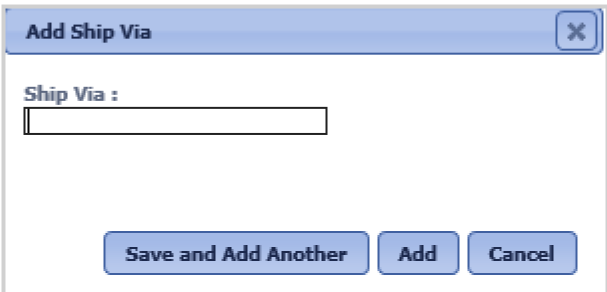
Select Ship Vias in the Type drop-down list.



Primary Lists page – Ship Via

Click the Add icon for Ship Via.

The Add Ship Via dialog box is displayed.



Add Ship Via dialog box

Enter a Ship Via of up to 50 characters.

Click the Save and Add Another button to add another Ship Via, click the Add button to save the Ship Via and return to the Primary Lists page, or click the Cancel button to return to the previous page without saving any changes.

Ship Vias are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Reviewing Material Transfer Information

From the Main Menu, select Assets -> Material Transfers.

The Material Transfer Search page appears.

Use one or more of the filters to determine which of the transfers will be displayed. Leaving the filter blank will show all transfers for the pre-defined period. For older transfers, see the Reports section.

Enter a component name or a partial name in the **Component/Item** filter.

Select one or more locations from the **From Location** filter drop-down list.

Select one or more sub locations from the **To Location/Sub Location** filter drop-down list.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Select a transfer type from the dropdown list in the **Type** filter.

Enter a reference or partial reference in the **Ref** filter.

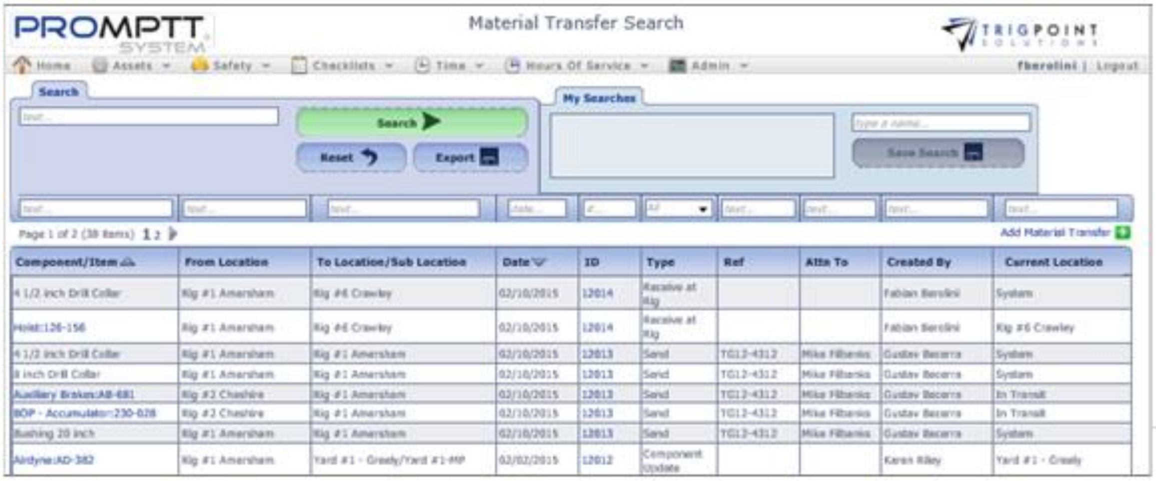
Enter a name or a partial name in the **Attn To** filter.

Enter a name or a partial name of a user in the **Created By** filter.

Select one or more locations from the **Current Location** filter drop-down list.

Click the Search button.

The search results are displayed.



Material Transfer Search page

The Search Pages section contains additional information about search pages.

Click the ID of a Material Transfer.

The Material Transfer Detail dialog box is displayed.

Material Transfer Detail dialog box

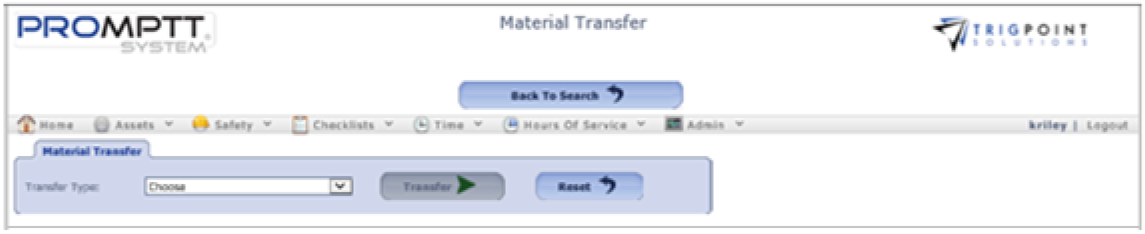
Click a Component Name to view the Component Details page for the component.

Creating a Material Transfer

From the Main Menu, select Assets -> Material Transfers.

Click the Add icon for Add Material Transfer in the upper right-hand corner.

The Material Transfer page is displayed.



Material Transfer page

The Transfer number is automatically created using the next up number. This is the unique identifier for the transfer.

The Date Shipped defaults to the current Date/Time

Select a transfer type.

Select a “Destination Location” from the list of locations in the drop-down list after choosing a transfer type.

The components and items on the transfer will be moved to this location when the transfer is completed.

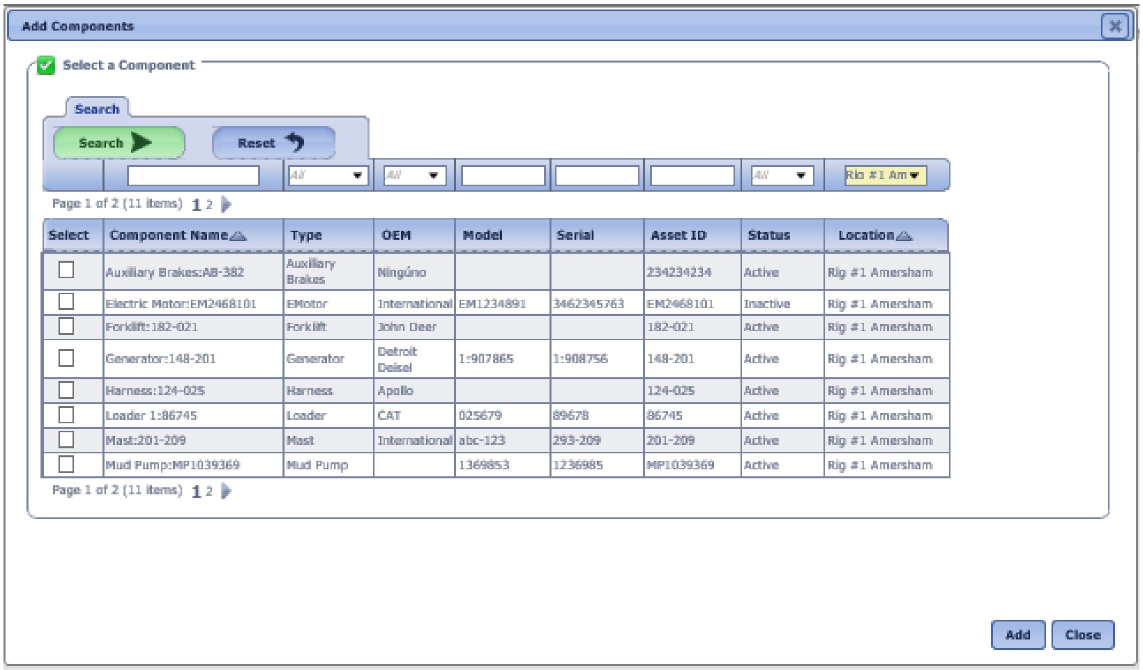
Enter the following information

> **Ship Via** Only for material transfers of type send. Select the shipper from the “Ship Via” from the drop-down list or click the letter icon and manually type in the value. Enter up to 50 characters.
>
> **Attn To** Only for material transfers of type send. Enter person to whom the package is being sent. Enter up to 50 characters.
>
> **Shipping Reference #** Only for material transfers of type send. It can be used to note any existing internal shipment reference number. Enter up to 50 characters.

Enter any notes.

To create a material transfers, at least one component, inventory, or non-inventory item must be added to the transfer. Components can be added to the Material Transfer. To add components to the transfer, click the Add icon for Add Component.

The Add Component dialog box will be displayed.



Add Components dialog box

The location will default to the user’s assigned location. This can be changed to select components from other locations.

Use one or more of the following filters to limit the number of components to be displayed: Component Name, Type, OEM, Model, Serial, Asset ID, Status, or Location. Leaving the filters blank will select all components for the selected location.

Click the Search button to perform the search.

The system displays the lists of components that match the entered search criteria.

Click the Select box for any components on the page that are to be added to the transfer, and click the Add button. Each page of components must be entered separately. When all of the components have been added, click the Close button to return to the Material Transfer page.

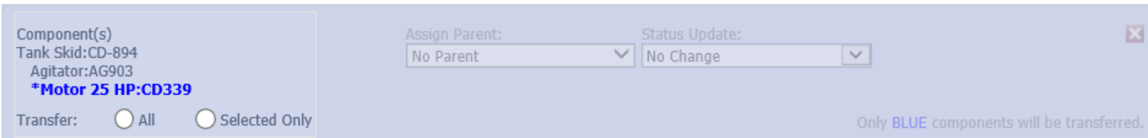
The components will be displayed on the Material Transfer page

Assign Parent field

When the material transfer type has Parent Component Assign flag set to Y and transfer type is a receive, a new parent can be assigned to the component at this time. Select a parent from the drop-down list of the Assign Parent field. The drop-down list will display components that are already assigned to the receive location.

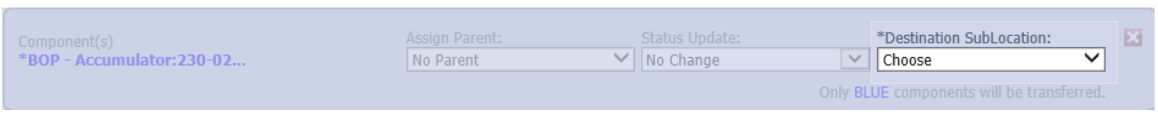
A new status can be assigned to the component at this time on transfer types of both send and receive. Select a status from the drop-down list of the Status Update field. Leaving the Status Update field blank will keep the component at its current status when transferred.

Components that are part of a family can be received as a single component or the whole family can be received. After adding the component to the transfer, select the All radio button to receive the whole family, or select the Selected Only radio button to receive the single component. Only components in blue will be transferred.



Transfer All or Selected Only

When receiving a transfer at a location that has sub locations, the system will require that a sub location be entered. Select a sub location from the drop-down list of the Destination SubLocation field.

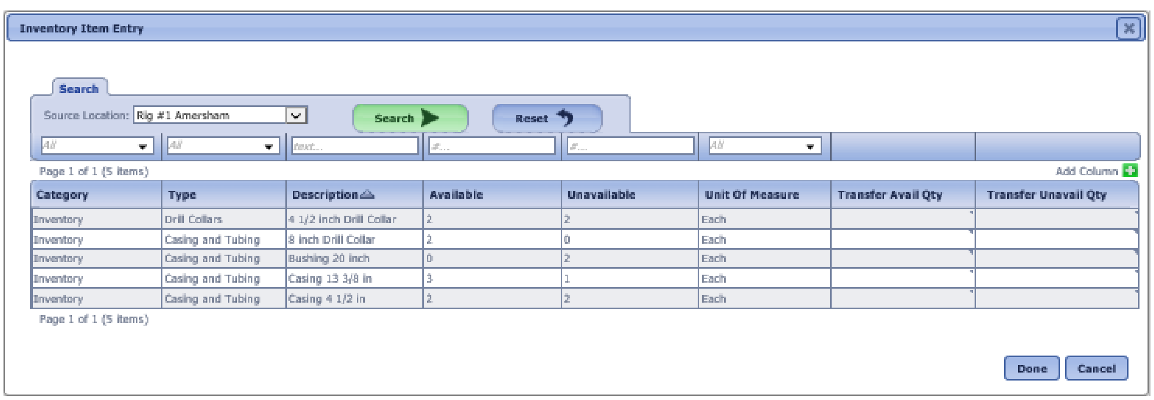


Destination SubLocation field

To delete a component from the transfer, click the Delete icon to the right of the component.

Inventoried items can be added to the Material Transfer. To add items to the transfer, click the Add icon for Add Inventory Item.

The Inventory Item Entry dialog box will be displayed.



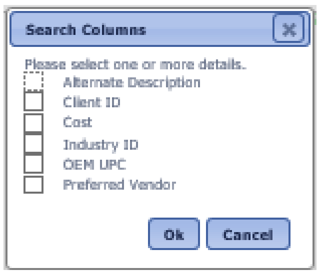
Inventory Item Entry dialog box

The source location will default to the user's location. This can be changed to select items from other locations.

Use one or more of the following filters to limit the number of items to be displayed: Category, Type, Description, Available, Unavailable, Unit of Measure, Transferred Avail Qty, or Transfer Unavail Qty. Leaving the filters blank will select all items for the selected location.

To see item details on this page, click on the Add icon for Add Column.

The Search Columns dialog box is displayed with a list of detail definitions that are assigned to items.



Search Columns dialog box

Select one or more of the details to be shown.

Click the OK button to add the details to the Inventory Item Entry dialog box or click the Cancel button to return to the Inventory Item Entry dialog box with no changes.

The columns are added to the dialog box. They will show any data that has been entered for the detail. Use the horizontal scroll bar to move back and forth across the page.

These details can be used as search criteria.

Click the Search button to perform the search.

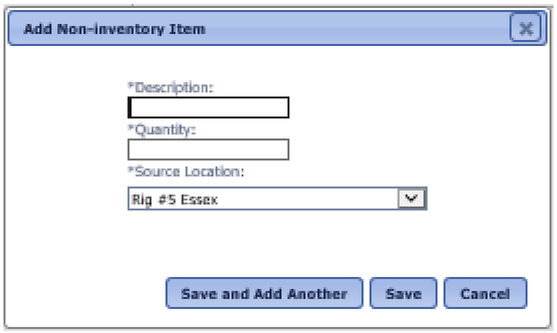
The system displays the lists of items that match the entered search criteria and have a positive value for Available, Unavailable, or the Sent status at that location, or have the Always Display flag set to "Yes".

Use the inline editing feature to add items to the Material Transfer. Click on the data cell that is to be changed, enter the new numeric value, and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change. The number must be positive and will accept up to two decimal places. For material transfers of type send, the shipment amount cannot be greater than the inventory at the location.

Click the Done button to add the items and return to the Material Transfer page, or click the Cancel button to return to the Material Transfer page without adding any items. Items can be removed from the transfer by clicking the Delete icon to the right of the item.

Non-inventoried items can be added to the transfer. This is accomplished by clicking the Add icon for Add Non-inventoried Item.

The Add Non-inventory Item dialog box is displayed.



Add Non-inventory Item dialog box

Enter the following information

> **Description** The description of the non-inventory item. Enter up to 50 characters.
>
> **Quantity** The quantity to be sent or received. Enter up to a 20-digit whole number.
>
> **Source Location** The location from which the item is being sent. Select the location from the drop-down list for Source Location.

Click the Save and Add Another button to save the non-inventory item to the transfer and add another non-inventory item, click the Save button to add the non-inventory item, or click the Cancel button to return to the Material Transfer page without adding a non-inventory item. Non-inventory items can be removed from the transfer by clicking the Delete icon to right of the non-inventory item.

Click on the Transfer button to complete the transfer.

The Material Transfer Summary dialog box is displayed.

Material Transfer Summary dialog box

Click the OK button to return to the Material Transfer Search page.

To print a hard copy of the material transfer, click on the printer icon at the top right of the material transfer dialog box.

Setting up Certification Checks

Companies need the ability to catch possible certification violations as the components are being transferred. The PROMPTT® System has the ability to check a component's certification date on the Handheld to ensure it is within the specified tolerances and allow the component to be found and removed from the transfer.

Setting up the Control Table

The control table has two values that are used with certifications. A minimum of one of these values must be setup for certification checks to be performed. If both are setup, it will use the one that calculates the earliest day for the certification warning to be displayed.

CertificationThresholdDays Determines the date the certification warning will be displayed by subtracting this value from the certification due date. Enter a numeric value between 0 and 365.

Example:

Control Table: Certification Threshold Days = 31

Component A:

Last Cert Date = 2/28/2014

Cert interval = 365

2/28/2014 + 365 = 2/28/2015

The next certification is due on 2/28/2015

2/28/2015 – 31 days = 1/28/2015

The certification warning will start being displayed on 1/28/2015

CertificationThresholdPercent Determines the date the certification warning will be displayed by multiplying this value with the certification interval of the component.

Example:

Control Table: Certification Threshold Percent = 8

Component A:

Last Certification Date = 2/28/2014

Certification Interval = 365

The next certification is due on 2/28/2015

2/28/2015 – (365*.08) = 1/29/2015

The certification warning will start being displayed on 1/29/2015

Setting up the Components

For the system to check a component's certification, the component must have three specific component details assigned to the component. See the Creating and Modifying the Details section for instructions on how to add details to a component.

These details must have Detail to Handheld flag set to Yes. See the Creating and Modifying a Component Detail section for instructions on how modify component details.

Certification Interval The number of days between certifications. Enter a numeric value between 0 and 365.

Certification Required Determines if the component should have a certification check performed when it is being transferred. Set this value to Y to have the certification check performed for the component. Set it to N to not have the check performed for the component.

Last Certification Date The date that the last certification was performed. Select a date from the calendar.

Setting up the Material Transfer Type

A material transfer type has to have two fields set for a certification check to take place. See the Material Transfer Type section for instructions on how to modify a material transfer.

Cert Check Determines if the certification check should be performed for this type of material transfer. Set this field to Y to perform a certification check and give a certification expired warning anytime a component with an expired certification is added to the transfer. Select Y or N from the drop-down list.

Allow Exp Determines if components with expired certifications are allowed to be added to this type of material transfer. Set this field to N to prohibit components with expired certifications being added to the transfer. Set this field to Y to allow the override capability of adding components with expired certifications.

Please note that Handhelds have to be on the heavy publication in order to perform the check on components not at the handheld location.

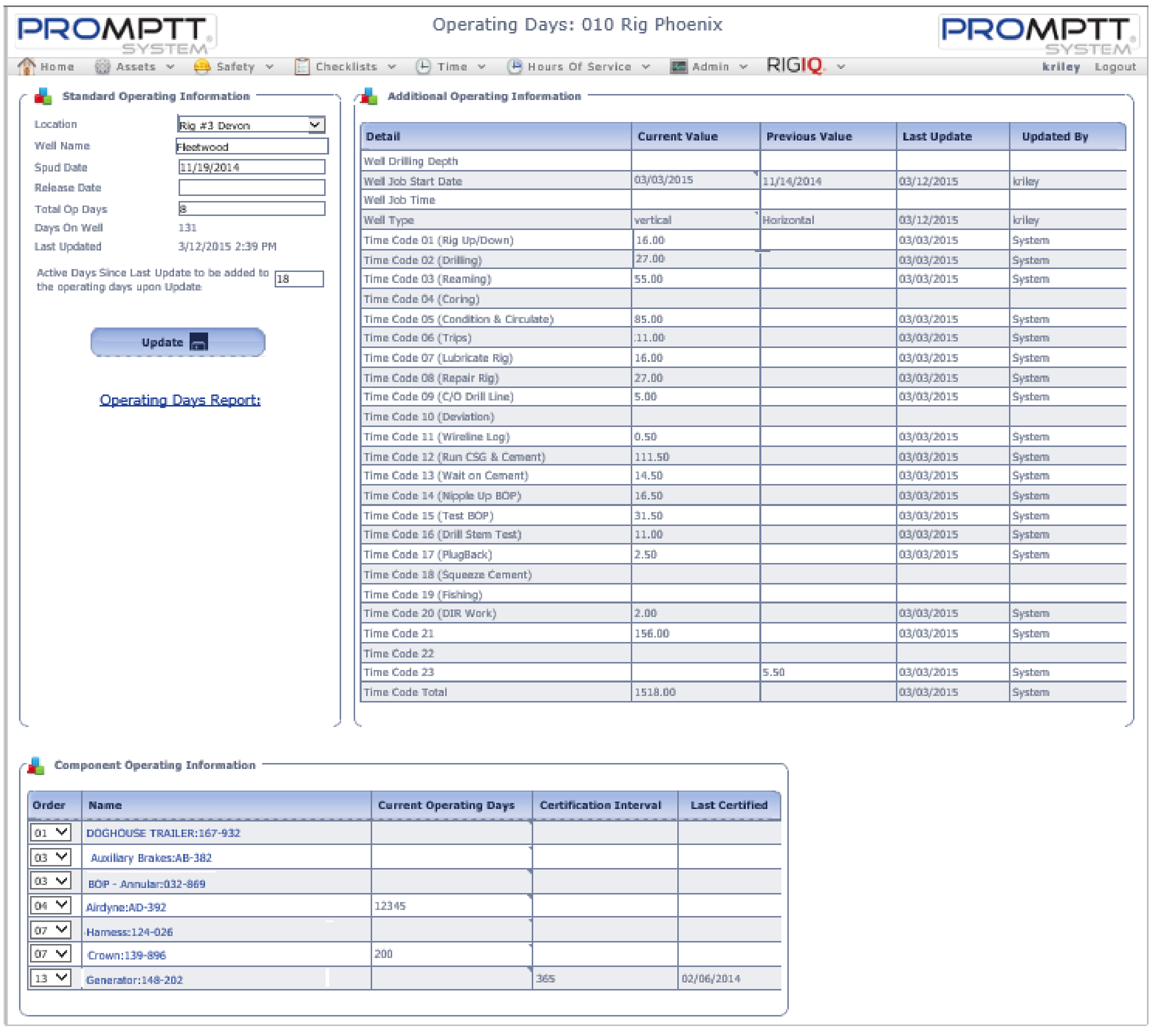
Operating Days

Through an API link to the Electronic Drilling Record (EDR), the PROMPTT® System can update specific details of locations. These location details are then used to update component details. This feature facilitates the maintenance of the component certifications. It allows managers to see the changing information on a daily basis. It can be used to send notifications based on user-defined parameters.

Reviewing Operating Days

From the Main Menu, select Assets -> Operating Days.

The Operating Days page is displayed.



Operating Days page

The Operating Days page contains three panes. The three panes are Standard Operating Information, Additional Operating Information, and Component Operating Information.

- Standard Operating Information provides the well name, spud date, release date, total op days, days on well, last update, Active days since last update to be added to the operating days upon update, type, current location, current sub location, status, and parent name of the component. There is a link to the Operating Days report.

- Additional Operating Information provides the well information received from the EDR, including International Association of Drilling Contractors (IADC) codes. The current value, previous value, last updated date, and who updated it are displayed.

- The Component Operating Information pane will show the current operating days, the certification interval, and the last certification date for the components at this location. For a component to be displayed in this pane, the component detail "Track Operating Days" must be added to the Component and set to a "Y".

Modifying Operating Days

Standard Operating Information pane

The information in the Standard Operating Information pane can be changed.

Well Name The name of the well. Enter a well name of up to 50 characters.

Spud Date The date that well was spudded. Select a date from the calendar.

Release Date The date that the well was released. Select a date from the calendar.

Total Ops Days The total number of operating days. Enter a number between 0 and 100,000.

Active Days Since Last Update to be added to the operating days upon Update The default days to be applied to the components. Enter a number between 0 and 10,000.

Click the Update button to change the data.

The Operating Days Report can be run for the location from this pane.

Click on the blue link labeled Operating Days Report.

Additional Operating Information pane

The Additional Operating Information pane can be modified using inline editing. The data cells that have a small triangle in the upper right-hand corner can be changed. Click on the data cell under Current Value that is to be changed, enter the value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

The data that is changed here will update the location details.

Component Operating Information pane

The left-most column can be used to determine what order the components will be shown in this pane

Inventory

Inventory management in the PROMPTT® System is used to track inventory, spare parts, and high volume, low value consumable items. These items have attributes that make them unsuitable for traditional asset tracking systems, yet it is important to have visibility of their use, location, and counts. Items can have an unlimited amount of user created details against them. Items are created easily and consistently with the use of templates. Items are able to have images and attachments associated with them.

Reviewing Inventory

From the Main Menu, select Assets -> Inventory.

The Inventory page is displayed.

To see inventory by a location type, select a type from the Location type filter.

To see inventory by a location group, select a group from the Location group filter.

Use one or more of the filters to determine which of the items will be displayed. Leaving the filter blank will show all items.

Select one or more categories from the **Category** filter drop-down list.

Select one or more item types from the Item **Type** filter drop-down list.

Enter a description or partial description of an item in the **Description** filter.

Enter a whole number in the **Available Qty** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

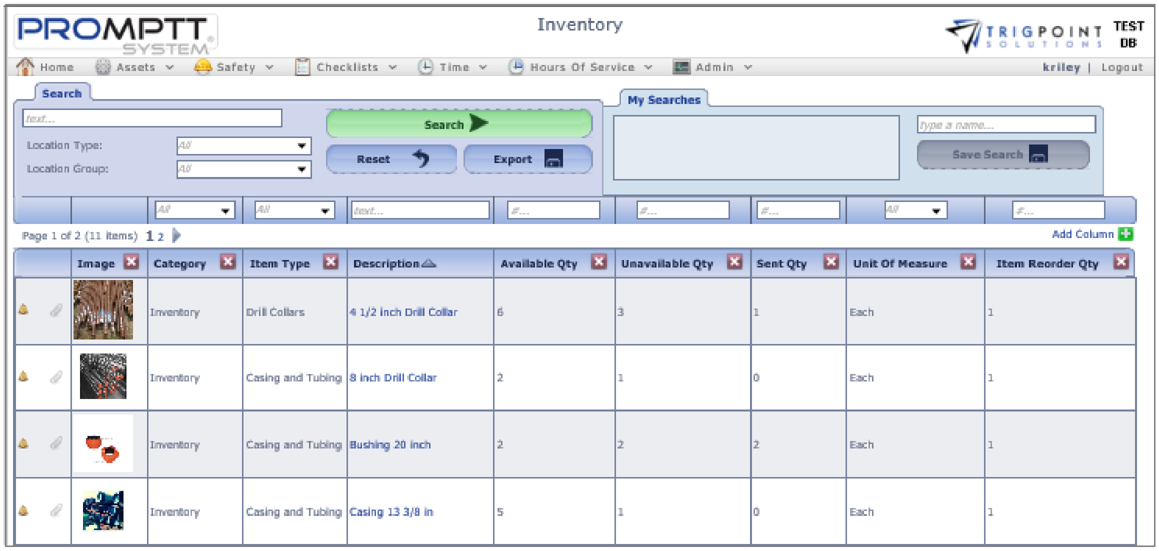
Enter a whole number in the **Unavailable Qty** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a whole number in the **Sent Qty** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Select a unit of measure from the **Unit of Measure** filter drop-down list.

Enter a whole number in the Item **Reorder Qty** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Click the Search button to display the results of the search. The available, unavailable, and sent quantities shown on the Inventory page are the sum of the quantities available for the locations and filters selected.



Inventory page

Columns can be reordered by clicking and holding on the name of the column then dragging and dropping to the chosen location.

To see any notifications for the item, click on the Bell icon . To see any notes for the item, click on the Notes icon . Any item that has an attachment will display the Paperclip icon .

The Search Pages section contains additional information about search pages.

Reviewing Inventory Details

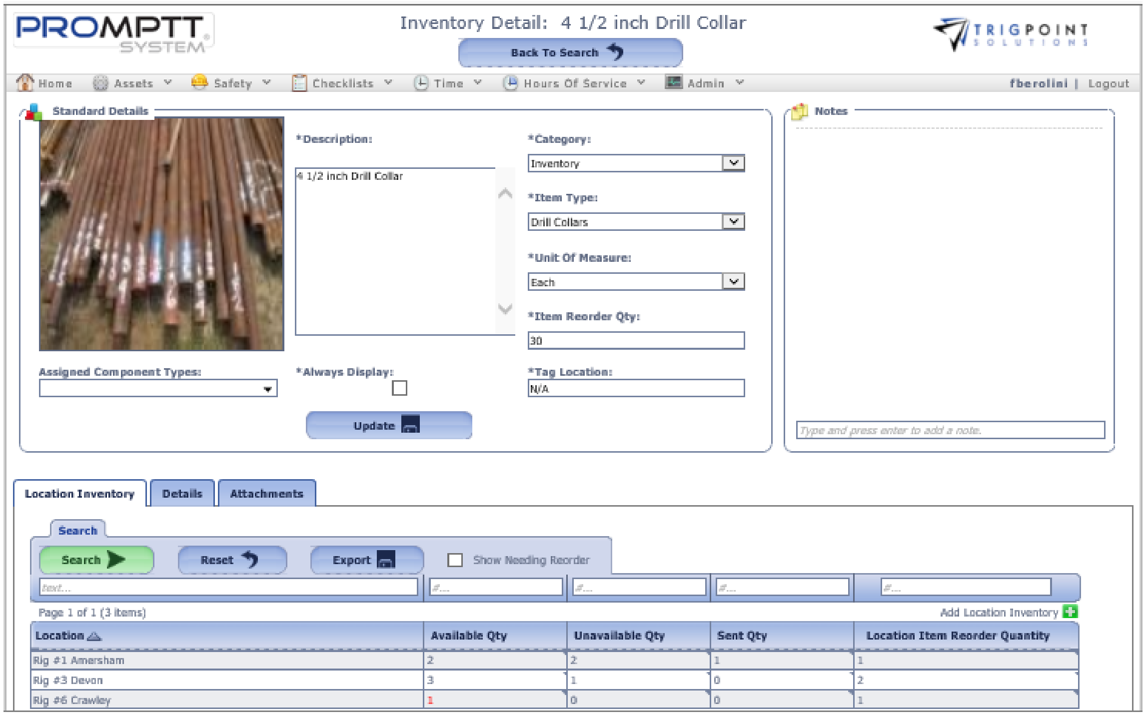
When you click the description of an item from the Inventory page, the Inventory Detail page for that item appears. The Inventory Detail contains a header section and three tabs. The three tabs are Location Inventory, Details, and Attachments.

- The **Header** section of the Inventory Detail page shows the standard details for the item, the primary image, and any notes associated with the item.
- The **Location Inventory** tab displays the current inventory broken out by location and status. Location quantities can be modified here.
- The **Details** tab displays the details for the item. If the detail definition is set to allow editing, the value can be changed here using inline editing.
- The **Attachments** tab displays any images or attachments that have been associated with the item, if the image is the primary image, and if the attachment will synchronize to the Handheld.

Modifying the Standard Details

After performing an inventory search, click on the name of the item that is to be modified.

The Inventory Detail page is displayed.



Inventory Detail page

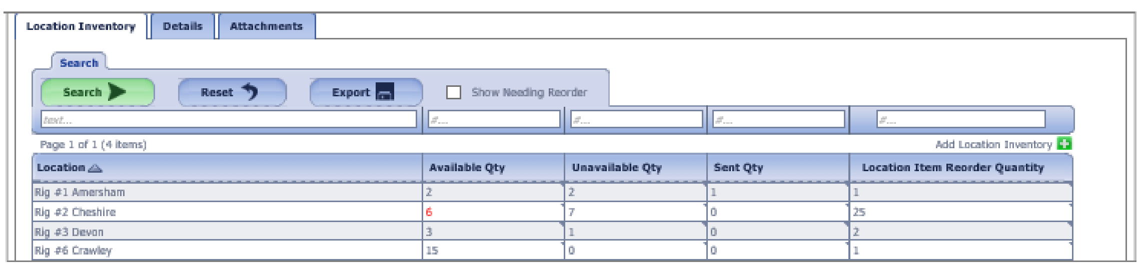
The upper pane is the Standard Details pane. From here, you can enter a new value in one of the standard detail fields. Click the Update button to save the change.

To enter a note, click on the box at the bottom of the pane and enter the text. Pressing the Enter key will save the note.

Modifying the Location Inventory

After performing an inventory search, click on the description of the item that is to be modified.

The Inventory Detail page with the Location Inventory tab selected is displayed.



Location Inventory

Locations that have inventory for the item are shown. Any locations that are below the reorder quantity for either Available or Unavailable status of the item will display the quantity in red.

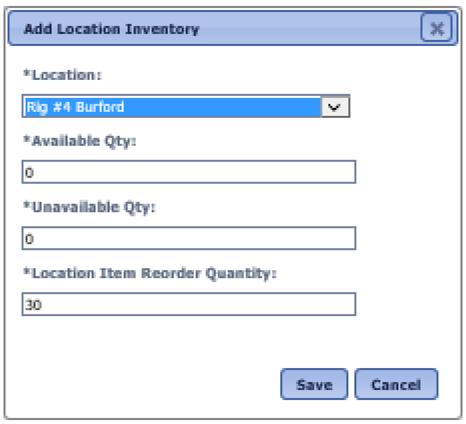
One or more of the filters can be used to limit the items displayed: Location, Available Qty, Unavailable Qty, Sent Qty, or Location Item Reorder Qty.

The Show Needing Reorder box can be checked to show only locations where the item have an inventory below the Location Item Reorder Quantity. Leaving the filters blank will select all locations.

The Available Quantity, Unavailable Quantity or the Location Item Reorder Quantity can be edited using inline editing. Click on the data cell that is to be changed, enter the numeric value and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add inventory to a location, click the Add icon for Add Location Inventory.

The Add Location Inventory dialog box is displayed.



Add Location Inventory dialog box

Enter the following information

Location The location to which the inventory is being added. Select a location from the drop-down list.

Available Qty The quantity that will be available for use at the location. Enter a numeric value with up to two decimal places.

Unavailable Qty The quantity that will be unavailable for use at the location. Enter a numeric value with up to two decimal places.

Location Item Reorder Quantity The quantity at which the item should be reordered for this location. This will default to the value setup in the Item Reorder Qty in the Master Item. Enter a whole number.

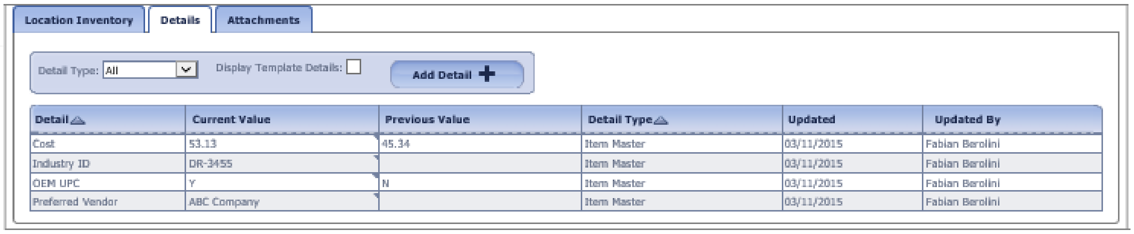
Creating and Modifying the Details

After performing an inventory search, click on the description of the item that that is to be modified.

The Inventory Detail page is displayed.

Click on the Details tab

The details associated with the item are displayed, sorted by Detail Type and then by Detail.



Details tab

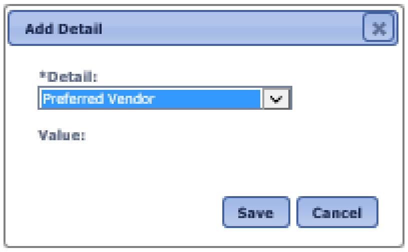
To limit the details to a specific type, click on the Detail Type filter and select a detail type. Checking the Display Template Details box will show only the details that were part of the template.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Only details that have the editable flag set to “Yes” can be modified. Details that have this flag set to “Yes” have a small triangle in the upper right-hand corner of the data cell in the current value column. Click on the data cell that is to be changed, enter the new value, or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add a detail click the Add Detail button

The Add Detail dialog box is displayed.



Add Detail dialog box

Select a detail from the drop-down list and optionally enter a value for the detail.

Click the Save button to save the detail and return to the Details tab, or click the Cancel button to return to the Details tab without saving.

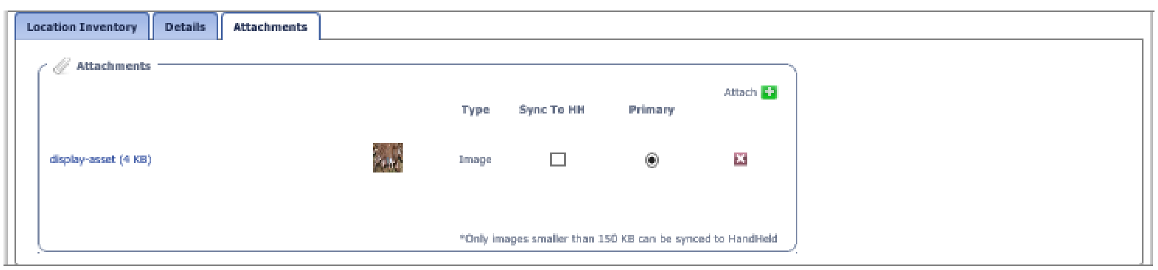
Creating and Deleting Attachments

After performing an inventory search, click on the name of the item that is to be modified.

The Inventory Detail page is displayed.

Click on the Attachments tab

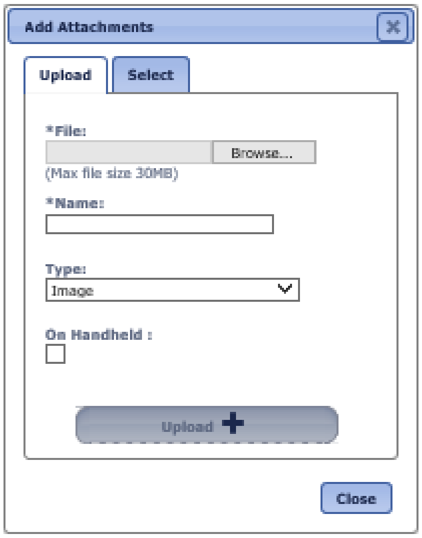
The attachments associated with the item are displayed.



Attachments tab

To upload an attachment, click the Add icon for Attach in the upper right-hand corner of the Attachments pane.

The Add Attachments box is displayed.



Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

Enter the Name and select the type of attachment.

If the attachment is an image that is to be synchronized to the Handheld, click the On Handheld box.

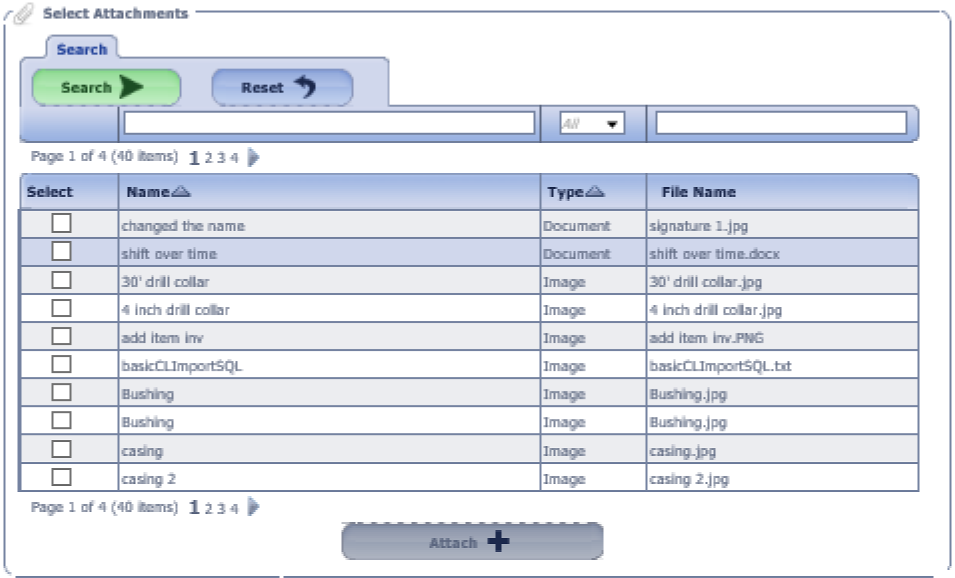
Click the Upload button.

Click the Browse button to add another attachment or click the Close button to return to the Attachments tab.

The attachment is now associated with the item.

To add an existing image, click the Select tab.

The Select Attachments dialog box is displayed with a list of attachments.



Add Attachments dialog box – Select

One or more of the filters can be used to limit the number of attachments displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for any attachments on the page that are to be added to the item, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

If the attachment type is an image, there is an option in the Attachments pane to select the image as the Primary image for the item. A primary image will display on the Inventory page and on the Location Inventory page.

The checkbox to Synchronize to the Handheld can be modified in the Attachments pane. If the box is checked, the image will be sent to the Handheld. If it is unchecked, the image will not be sent. Please note that the size of the images that can be synchronized to the Handheld is user defined.

To delete an attachment, click the Delete icon to right of the attachment.

Tasks

Tasks are any type of work or activity that needs to be performed, from daily checks to monthly maintenance to safety meetings. Tasks can be scheduled at any interval and optionally assigned to a specific user type or skill level. A task list is completed on a handheld device or on the website. To create a task, please see the Setting up Tasks section.

Reviewing Tasks Lists

From the Main Menu, select Assets -> Tasks.

The Task List Search page appears.

Use one or more of the filters to determine which of the tasks will bed displayed. Leaving the filter blank will show all tasks.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a task name or partial task name in the **Task List** filter.

Select one or more locations from the **Location** filter drop-down list.

Select one or more types from the **Type** drop-down list.

Select one or more statuses from the **Status** drop-down list.

Select one or more priorities from the **Priority** drop-down list.

Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Expires** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Created** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter the percent in the **Pct** filter.

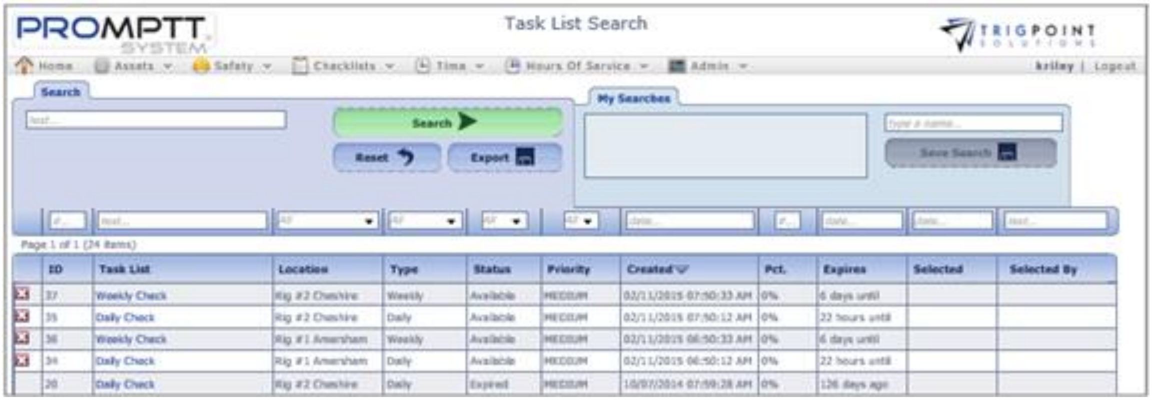
Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Due** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Selected** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter a user name or partial user name in the **Selected By** filter.

Click the Search button to execute the search.

The search results are displayed.



Task List Search page

To cancel a task, click the Delete icon to the left of the task list. Only tasks that have not expired and have not been completed can be cancelled.

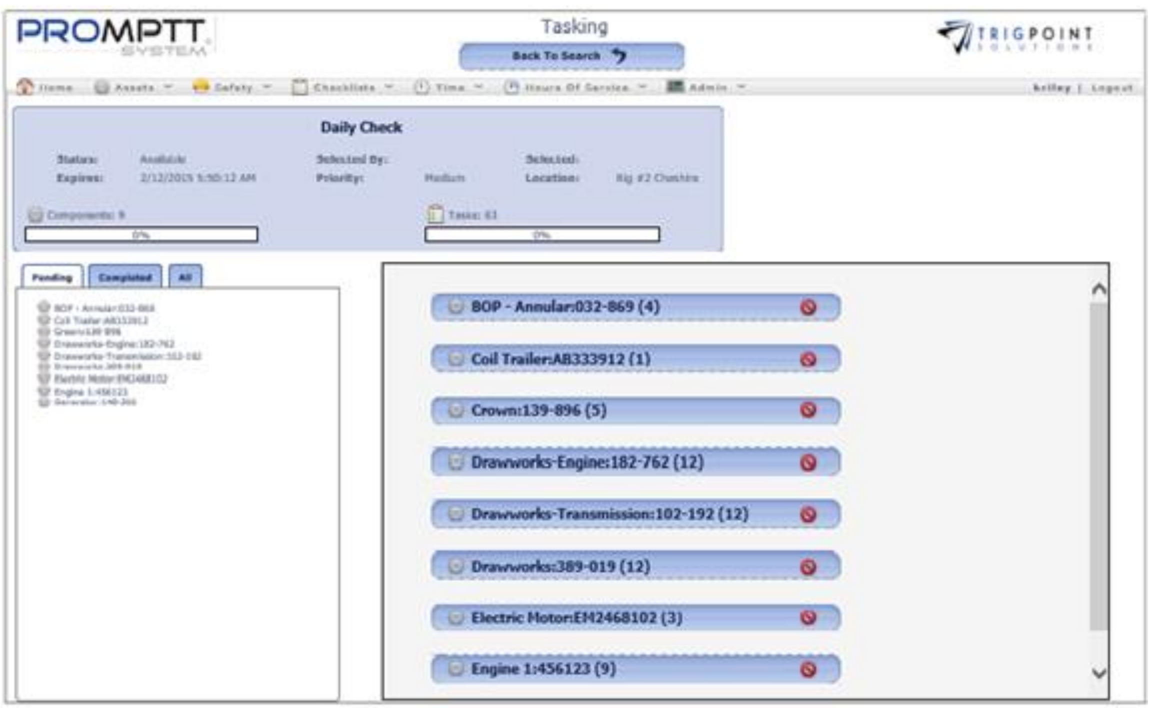
The Search Pages section contains additional information about search pages.

Completing a Task on the Website

Tasks are completed on the Handheld or the website.

After performing a task search, click on the name of the task list that is to be completed.

The Tasking page is displayed with the task and all of its components.



Tasking page

In the main pane on the right, click on the component that is to be worked.

The component is expanded to show all the plan groups under it.

If the group cannot be completed, click on the Reject icon .

A list of reject codes is displayed.

Select a reject code to reject the group, or click the Back button to return to the top of the group without making any changes.

If the group is to be completed, click the group that is to be worked.

Groups that do not have confirmation text set up will display the instructions.

Groups that have confirmation text setup will display the confirmation text as a question. The Accept text and the Decline text will display as answer buttons.

To return to the groups without answering the question, click the Decline text button.

To start the group click the Accept text button, and the instructions will be displayed.

The Back button can be clicked to return to the previous page.

Click on the information icon to see the display text from the instruction.

Click on the image icon to see the image associated with the instruction.

Click on the Close button to close the image.

If the instruction cannot be completed, click on the Reject icon .

A list of reject codes is displayed.

Select a reject code to reject the group, or click the Back button to return to the top of the group without making any changes.

Click the instruction to be completed to answer each instruction individually, or click the Select All button to have each of the instructions prompted in sequence.

The system will display the first instruction as a question with the answers shown below the question.

Answer the question for the instruction.

Depending on how the plan is setup in the system, either click on the second instruction or answer the sub-instruction.

Answer all the instructions and sub instructions until the group is complete. Repeat this step until all the groups have been completed. If there is more than one component for the task, repeat the process until all of the components have been completed.

The Back button can be clicked at any time to return to the previous page.

Once all of the instructions have been completed, click the Back to Search button to return to the Task List Search page.

The task status will display as completed.

Work Orders

Work Orders are used to track required repairs at a particular location. There are multiple ways of creating Work Orders.

- Work Orders are created by the system as a deficiency Work Order via tasking or a task can be created to schedule a Work Order.
- Work Orders are created manually by the user on the website or the handheld.

Reviewing a Work Order

From the Main Menu, select Assets -> Work Orders.

The Work Orders page is displayed.

Use one or more of the filters to determine which of the work orders will be displayed. Leaving the filter blank will show all work orders.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Select one or more locations from the **Location** filter drop-down list.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Due** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Select one or more priorities from the **Priority** filter drop-down list.

Enter a description or partial description in the **Description** filter.

Select one or more types from the **Type** filter drop-down list.

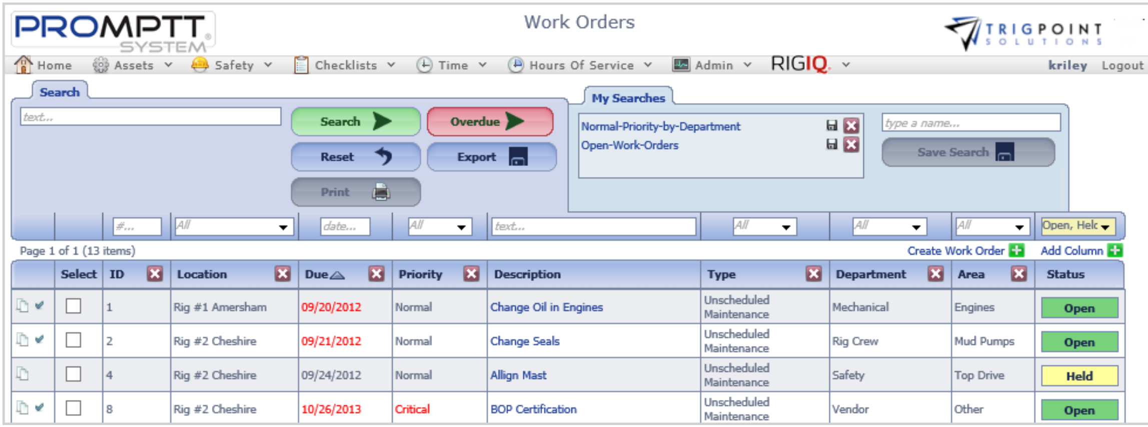
Select one or more departments from the **Department** filter drop-down list.

Select one or more areas from the **Area** filter drop-down list.

Select one or more statuses from the **Status** drop-down list, or take the default of Hold and Open. Select All to see all work orders with any status.

Click the Search button.

The search results are displayed. Any overdue open work orders will have the due date displayed in red. Any critical work orders will have the priority displayed in red.



Work Orders page

To only see overdue Work Orders, click the Overdue button.

Only work orders that have passed their due date are displayed.

To create a printable PDF file of the Work Order, click the Select box for the Work Orders to be printed, and click the Print button.

The system will prompt to Open, Save, or Cancel the print file. Click the Open button to view the print file in a PDF format, click the Save button to save the print file in the Downloads directory, or click the Cancel button to cancel the operation.

To close a work order from the Work Order page, click the check icon to the left of the Work Order. If all the information required to complete the Work Order has been entered, the Work Order will be set to a Completed status. If the information to complete the Work Order has not been entered, the Work Order page will be opened and a red warning will be displayed next to any sections that still require information.

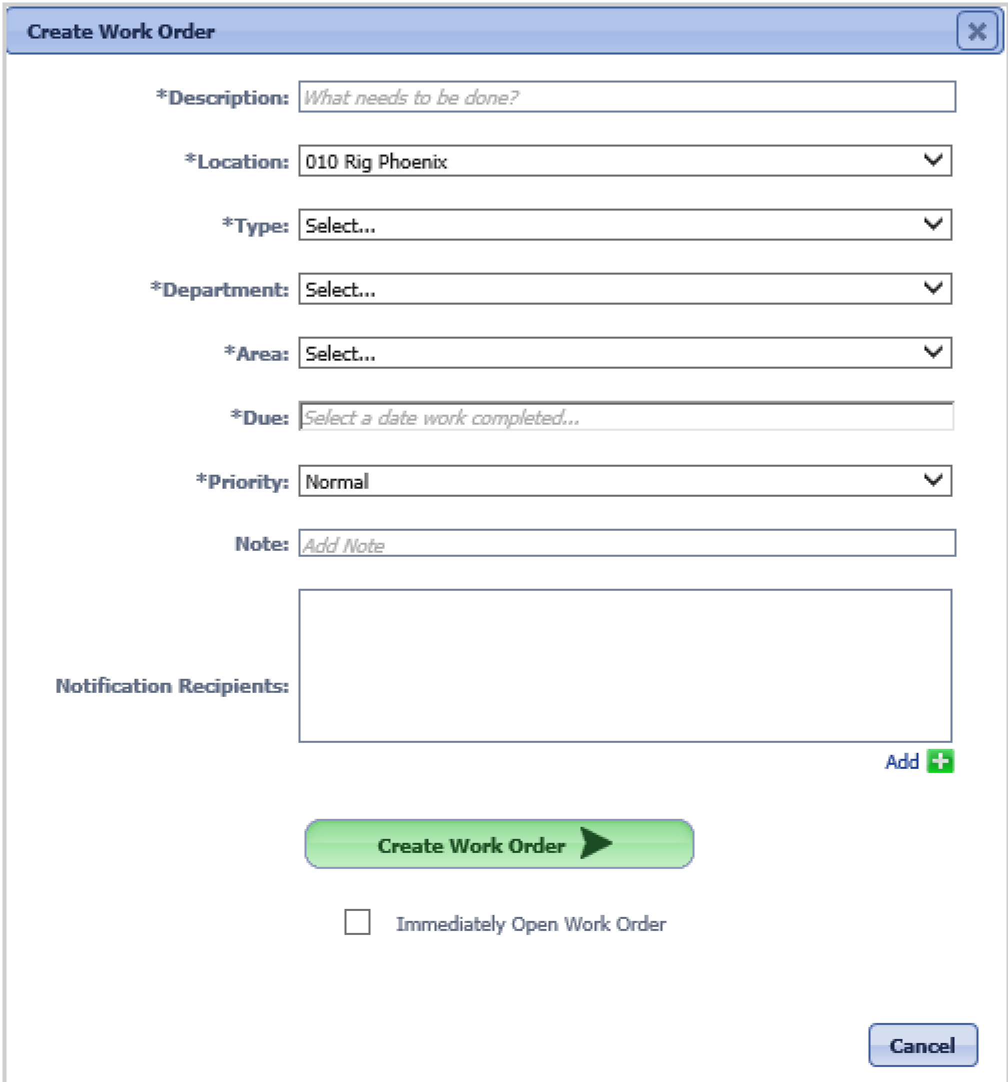
The [Search Pages](#) section contains additional information about search pages.

Creating a Work Order

From the Main Menu, select Assets -> Work Orders.

Click the Add icon for Add Work Order, located on the right-hand side of the page.

The Create Work Order dialog box is displayed.



Create Work Order dialog box

Enter the information for the Work Order

Description Enter a description of the Work Order.

Location The Location defaults to the user's assigned location but can be changed by selecting another location from the drop-down list.

Type The type is used to group work orders together for reporting purposes and is used in RIGIQ reporting. Select a work order type from the drop-down list.

Department Select a Department from the drop-down list.

Area Select an Area from the drop-down list.

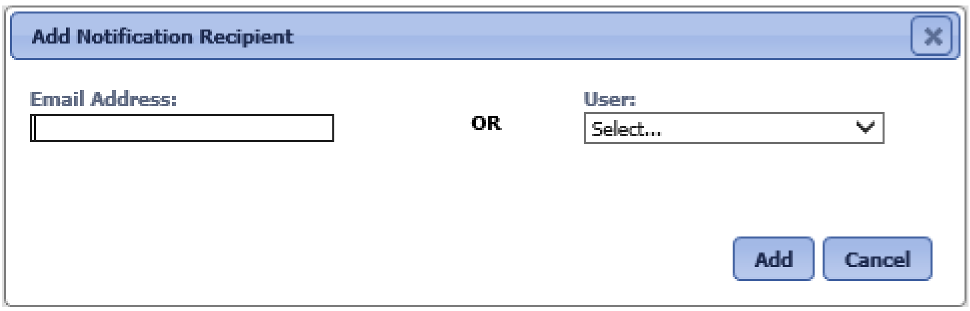
Due Date Select a Due Date from the calendar.

Priority The Priority defaults to Normal but can be changed by selecting another priority from the drop-down list. A priority of Critical will have the priority in the Work Order page colored in red.

Notes Optionally enter any Notes in the note entry area.

Notifications Below the Notification pane, to the right, click the Add icon for the Notification pane to add notification recipients.

The Add Notification Recipient dialog box is displayed.



Add Notification Recipient dialog box

To add a notification recipient, enter an email address or select a user from the drop-down list and click the Add button. To add another person to be notified, click the Add icon again.

The mandatory fields are denoted with an asterisk (*) and require information to be entered in order to create the Work Order.

Additional information can be added to the work order by clicking the check box next to Immediately Open Work Order.

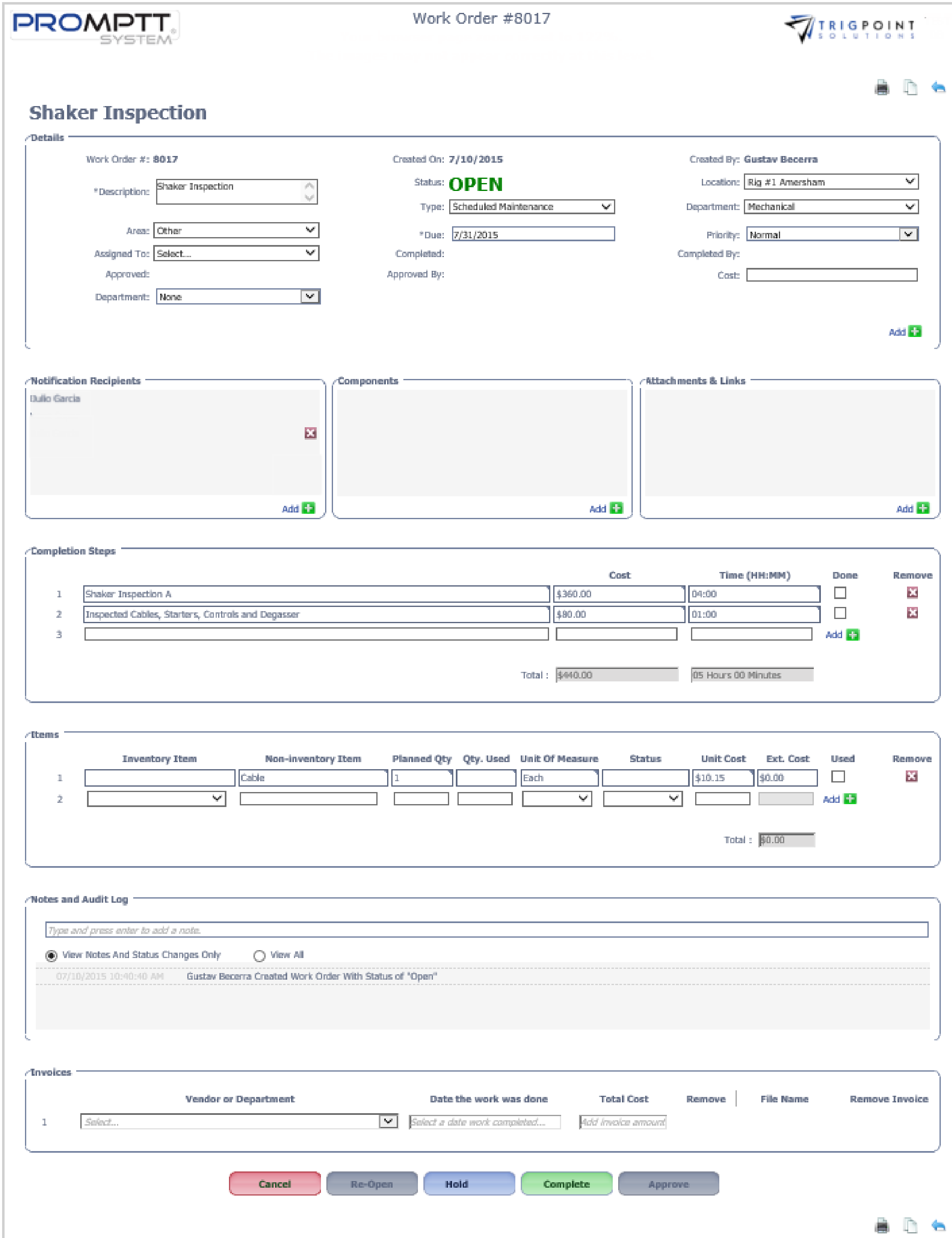
Click the Create Work Order button.

The work order is created. The Work Order ID is automatically created using the next up number. This is the unique identifier for the Work Order.

The Current Status will always be Open for new work orders. The status will be changed as the work order is processed through the system.

If the Immediately Open Work Order box was not checked, the Work Orders page will be displayed.

If the Immediately Open Work Order box was checked, the Work Order Detail page is displayed. Follow the instruction in Modifying a Work Order in the next section to edit any of the displayed information.



Work Order Detail page

Modifying a Work Order

When you click a work order description or status from the Work Orders page, the Work Order page is displayed. The Work Order page contains eight panes. The eight panes are Details, Notification Recipients, Components, Attachments and Links, Completion Steps, Items, Notes and Audit Log, and Invoices. The order of the different panes are user defined and are setup in the Control Values.

- The **Details** pane displays the work order header information; this includes the description, department, area, due date, priority, work order details, the user the work to which the work order is assigned, the completion and approval information, as well as the status. Both the date and user who completed or approved the work order are updated automatically by the system at the time the work order status is changed.
- The **Notification Recipients** pane displays any users or email addresses that are to be notified about the work order. Any user listed here will have an email sent to them whenever the subscription is activated.
- The **Components** pane shows any components that have been associated with the work order.
- The **Attachments** and **Links** pane displays any images, attachments, or links that have been associated with the work order.
- The **Completion Steps** pane displays any labor to be used on the work order.
- The **Items** pane displays any inventoried or non-inventoried items that have been planned for use or used on the work order. This pane will only be displayed if the environment has the Inventory module turned on.
- The **Notes and Audit Log** pane displays any notes that have been entered for the work order as well as the status changes the work order has gone through.
- The **Invoices** pane displays the information for any invoices that are attached to the work order.

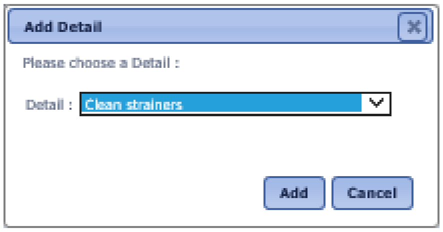
Adding Work Order Details

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have details added.

The Work Order Detail page is displayed.

In the lower right-hand corner of the Details pane, click the Add icon for Add Detail.

The Add Detail dialog box is displayed.



Add Detail dialog box

Click on the drop-down list for Detail. Only detail definitions that have been assigned to work orders in the detail definition are displayed. Select the detail to be added to the Work Order, and click the Add button. Click the Cancel button to return to the Work Order page without adding a detail.

The detail is added to the Work Order and defaults to the detail default value.

Modify the detail to the correct value. When the detail definition is set to allow editing, the detail can be modified after it is added to the work order.

Click the Update button to save the changes. To cancel the change, click the back icon to return to the Work Orders page without saving the change.

Adding Notification Recipients to a Work Order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have notification recipients added.

The Work Order Detail page is displayed.

In the Notification pane, in the lower right-hand corner, click the Add icon to add notification recipients.

To add a notification recipient, enter an email address or select a user from the drop-down list and click the Add button. To add another person to be notified, click the Add icon again.

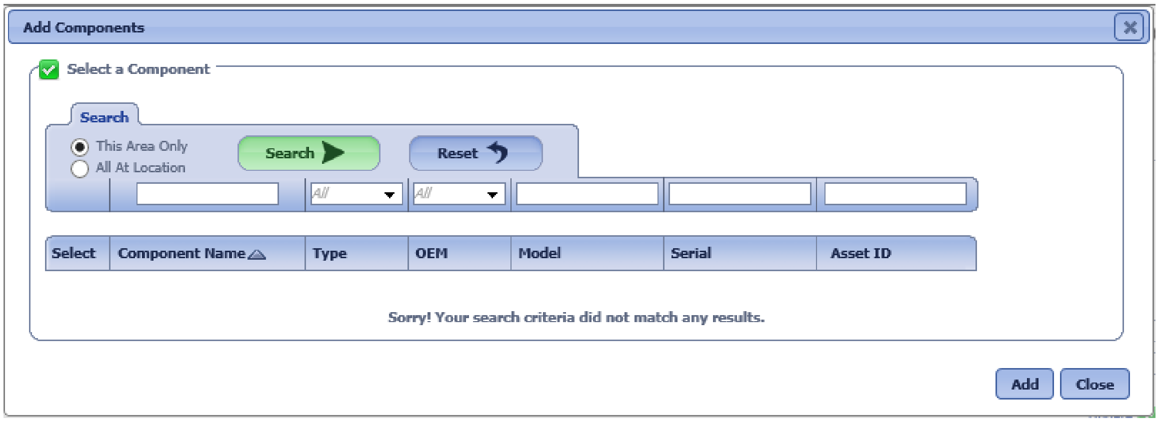
Adding Components to a Work Order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have components added.

The Work Order Detail page is displayed.

Click the Add icon in the lower right-hand corner of the Components pane to add components to the Work Order.

The Add Components dialog box is displayed.



Add Components dialog box

The radio button for This Area Only are checked by default. This can be changed to search All at Location by clicking the radio button next to the option.

Use one or more of the following filters to limit the number of components displayed: Component Name, Type, OEM, Model, Serial, or Asset ID. Leaving the filters blank will select all components for the location.

Click the Search button to perform the search.

The system displays the lists of components that match the entered search criteria.

Click the Select box for any components on the page that are to be added to the work order, and click the Add button. Each page of components must be entered separately. When all of the components are added, click the Close button to return to the Work Orders page.

Adding Attachments and Links to a Work Order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have attachments and links added.

The Work Order Detail page is displayed.

In the Attachments and Links pane, in the lower right-hand corner, click the Add icon for the Attachments and Links pane to add attachments or links to the Work Order.

The Add Attachments dialog box is displayed.

Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

Enter the Name and select the type of attachment.

If the attachment is an image and is to be synchronized to the Handheld, click the On Handheld box.

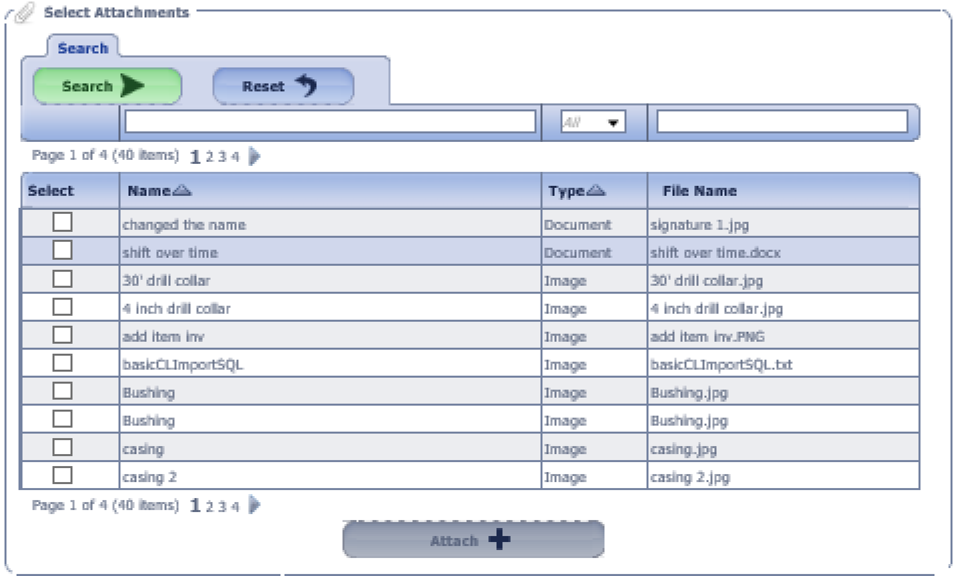
Click the Upload button.

Click the Browse button to add another attachment or click the Close button to return to the Attachments tab.

The attachment is now added to the Work Order

To add an existing image, click the Select tab.

The Select Attachments dialog box is displayed with a list of attachments.



Add Attachments dialog box – Select

Use one or more of the following filters to determine the attachments to be displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for any attachments on the page that are to be added to the work order, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

The attachment is now added to the work order.

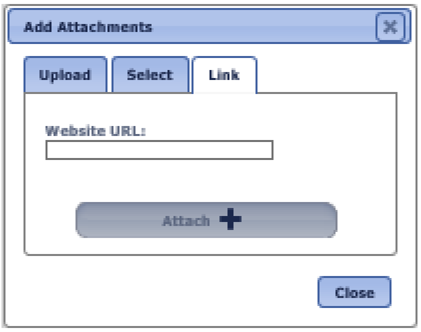
The checkbox to Synchronize to the Handheld can be modified in the Attachments and Links pane. If the box is checked, the image will be synchronized to the Handheld. If it is unchecked, the image will not be synchronized. Please note that the size of the images that can be synchronized to the Handheld is user defined.

To delete an attachment, click the Delete icon to right of the attachment.

To add a link

Click on the Add icon in the lower right corner of the Attachments and Links pane.

The Add Attachments dialog box is displayed. Click the Link tab.



Add Attachments dialog box – Link

Enter the URL into the Website URL field.

Click on the Attach button.

Click the Close button when all links have been added to return to the work order.

Adding Completion Steps to a Work Order

Completion Steps are used to track the labor used on the Work Order. To add a completion step to a work order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open, Held or Completed status can have completion steps added. Adding completion steps to a work order will reopen the work order.

The Work Order Detail page is displayed.

Enter a description of the step in the first field of the Completion Steps pane.

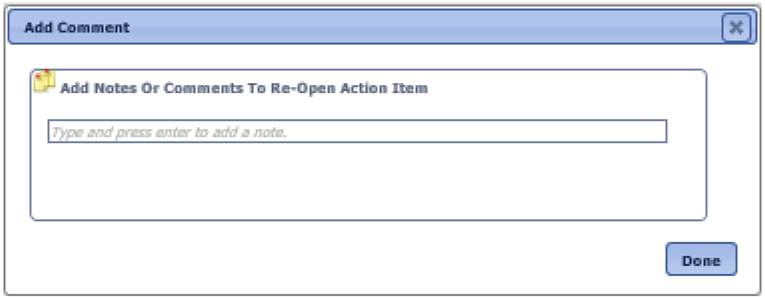
Optionally, enter the Cost and the hours required to complete the step.

When the step is complete, check the Done checkbox to the right of the step. The Work Order cannot be closed until all completion steps have been checked as being done.

A work order that has been completed can be still have a completion step added to it.

In the pane titled “Step1: Select whether the Procedure has completed”, enter a procedure, and optionally a cost and a time and click the Add icon .

An Add Comment dialog box is displayed.



Add Comment dialog box

Enter a comment as to why the Work Order is being re-opened and click the Done button.

The work order has an Open status.

Adding Notes to the Work Order

Notes can be added to the work order. The system automatically creates the audit log whenever a change to the work order takes place. To add a note to the work order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have notes added.

The Work Order Detail page is displayed. The View Notes and Status Changes radio button is marked by default.

In the Notes and Audit Log pane, type the note and press the Enter key.

To view the full Audit Log, click the View All radio button.

The full Audit Log is displayed in the Notes and Audit Log pane.

Adding Inventory to the Work Order

Items are added to the work order by entering an inventoried item in the Tracked Item field or a non-inventoried item in the Non-tracked field. To add inventory to the Work Order

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have inventory added.

The Work Order Detail page is displayed.

Use the inline editing feature to add items to the work order. Click on the data cell that is to be changed, enter the value or select a value from the drop-down list, and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

> **Inventory Item** A drop-down list with all of the items that have an inventory amount greater than zero at the work order location. Select an item from the drop-down list.

Non-inventory Item A free-form text field. Enter the non-tracked item that is to be used on the Work Order. Enter up to 300 characters.

Planned Qty The quantity of the item that it is estimated will be used on the Work Order. The number must be positive and will accept up two decimal places.

Qty Used This is the actual quantity of the item that is used on the Work Order. The number must be positive and will accept up two decimal places.

Unit of Measure If this is a tracked item, the field will default to value set up in the item record. If it is a non-tracked item, select a valid unit of measure from the drop-down list.

Status If this is a tracked item, select the status of the item that is going to be used on the Work Order. This field is disabled for non-tracked items.

Unit Cost If this is a tracked item, the value will default to the value set up in the item record. If this is a non-tracked item, enter the dollar value of the item.

Extended Cost This is calculated by the system and is the Qty Used times the Unit Cost.

Click the Add icon to add the item to the work order.

As the item is used on the Work Order, update the Qty Used.

When finished with the item for the work order, click the Used check box to have the system deduct the quantity used from the location inventory. Marking the work order as Complete will also deduct the quantity used from the location inventory. Once an item's used quantity has been deducted from the location inventory, it is no longer editable.

The Delete icon can be clicked to remove an item from the work order if the used checkbox has not been checked.

Adding Invoices to the Work Order

Invoices associated with the Work Order can be uploaded. A control value determines if invoices are required prior to completing a work order.

After performing a work order search, click on the description or the status of a work order to open the Work Order page. Only work orders that are in an Open or Held status can have invoices added.

Select a Vendor or Department from the drop-down list in the Invoices pane.

Select the date the work was completed.

Enter the invoice amount and click the Add icon .

Click the Attach Invoice icon to add a copy of the actual invoice.

To remove an invoice, click the Delete icon to the right of the invoice.

Copying a Work Order

From the Main Menu, select Assets -> Work Orders.

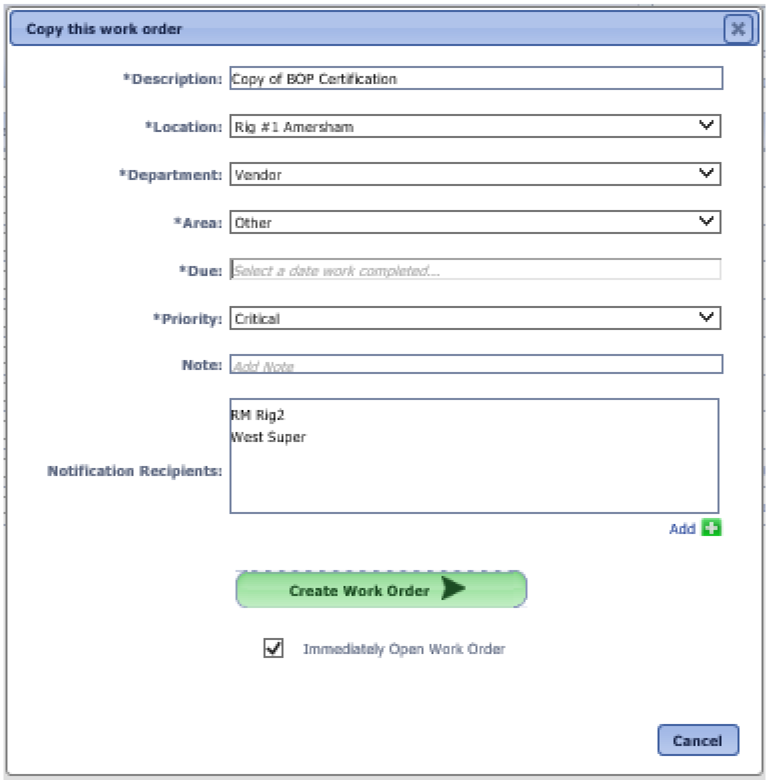
The Work Orders page is displayed.

One or more of the filters can be used to limit the number of work orders displayed: ID, Location, Due, Priority, Description, Department, Area, Created, or Status. Leaving the filters blank will select all work orders.

Click the Search button.

The search results are displayed.

Click on the copy icon to the left of the Work Order to be copied. This will bring up the Copy this Work Order dialog box.



Copy this Work Order dialog box

Enter the information for the Work Order

Description The original description prepended by “Copy of” is prepopulated in the description field. Modify the description if needed.

Location The original location is defaulted but can be changed by selecting another location from the drop-down list.

Type The type is used to group work orders together for reporting purposes and is used in RIGIQ reporting. Select a work order type from the drop-down list.

Department The original department is defaulted but can be changed by selecting another department from the drop-down list.

Area The original area is defaulted but can be changed by selecting another area from the drop-down list.

Due Date Select a due date from the calendar.

Priority The original priority is defaulted but can be changed by selecting another priority from the drop-down list. A priority of Critical will have the priority in the Work Order page colored in red.

Notes Optionally, enter any Notes in the note entry area.

Notifications The original notifications recipients will be defaulted. Recipients can be added to the Work Order by clicking the Add icon for the Notifications pane. To add another person to be notified, click the Add icon again.

To add additional information to the Work Order, click the check box next to Immediately Open Work Order.

Click the Create Work Order button.

If the Immediately Open Work Order box was not checked, the Work Order page is displayed.

If the Immediately Open Work Order box was checked, the Work Order page is displayed. Follow the instruction in Modifying a Work Order in the next section to edit any of the displayed information.

The Work Order ID is automatically created using the next up number. This is the unique identifier for the Work Order.

The Current Status will always be Open for new Work Orders, regardless of the status of the original Work Order.

Processing a Work Order

Completing an Open Work Order

When a Work Order is first created, it is in an Open Status. As work is performed for the Work Order, the status can be changed to either Completed or Held using the following steps. Work Orders cannot be closed until all procedure have been checked as being done.

After performing a work order search, click on the description or the status of a work order.

The Work Order page is displayed.

Click on the Complete or Hold button.

The status is changed to Held or Completed.

Click on the Back Arrow icon to return to the Work Order page

Re-opening a Held or Completed Work Order

A Held or Completed Work Order can be reopened at any time when the Work Order is ready to be worked, or if it is found that there is additional work to be done on it.

After performing a work order search, click on the description or the status of a work order.

The Work Order Detail page is displayed.

Click on the Re-Open button.

The status is changed to Open.

Click on the Back Arrow icon to return to the Work Order page.

Approving a Completed Work Order

Once a Work Order is completed, it must be approved. Once a Work Order is approved, it can no longer have the status changed.

After performing a work order search, click on the description or the status of a work order.

The Work Order page is displayed.

Click on the Close button.

The status is changed to Approved.

Click on the Back Arrow icon to return to the Work Order page.

Cancelling a Work Order

If a Work Order is entered by mistake, it can be cancelled. Once a Work Order is cancelled no other work can be done on it, nor can the status be changed.

After performing a work order search, click on the description or the status of a work order.

The Work Order page is displayed.

Click on the Cancel button.

An Add Comment dialog box is displayed.

Add Comment dialog box

Enter a comment as to why the Work Order is being cancelled and click the Done button.

The status is changed to Cancelled.

Click on the Back Arrow icon to return to the Work Order page.

Safety

Observation Cards

Observation cards are used on the Handheld to record any behaviors that are noticed on the rig. Both safe and at-risk behaviors can be recorded.

Reviewing Observations Cards

From the Main Menu, select Safety -> Observation Cards.

The Observation Cards page is displayed.

Use one or more of the filters to determine which of the observation cards is displayed. Leaving the filter blank will show all observation cards.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Time** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Select one or more risks from the drop-down list for the **Risk** filter.

Enter a JSA name or partial JSA name in the **JSA** filter.

Enter a JSA description or partial JSA description in the **JSA Description** filter.

Select a Yes, No or All from drop-down list for the **Stopped** filter.

Select a location from the **Location** filter drop-down list.

Enter a name or a partial name of a user in the **Observed By** filter.

Enter a name or a partial name of a user in the **Reviewed By** filter.

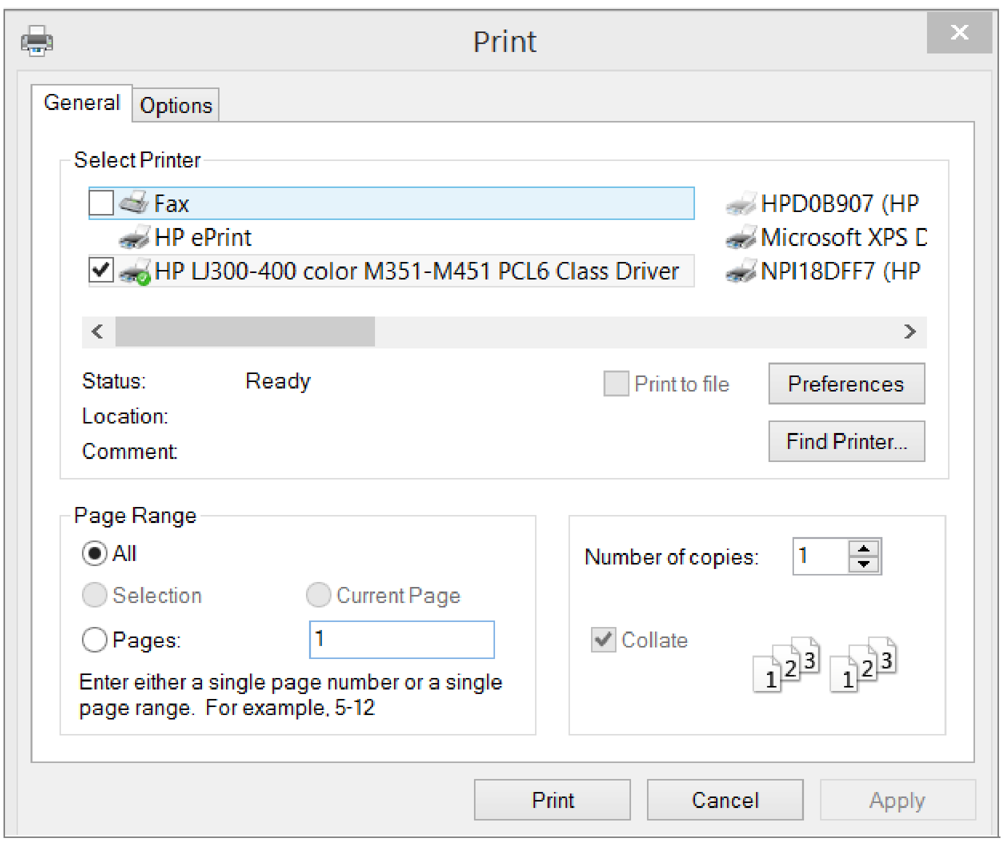
Select one or more statuses from the drop-down list for the **Status** filter.

Click the Search button to display the results of the search. Risks 1-3 will be shown in green, risks 4-6 will be shown in orange, and risks 7-9 will be shown in red. A status of Rejected will be shown in red, Approved will be shown in green, and a status of Pending will show in ochre.

Observation cards page

To create a printable PDF file of the Observation Card, click the Select box for the Observation Cards to be printed, and click the Print button.

The Print dialog box is displayed.



Print dialog box

Click the printer to select it and then click the Print button to print the observation, click the Cancel button to return to Observation Cards page without printing.

Clicking the High Risk button will show any observation cards that have a risk of seven, eight or nine.

Accepting and Rejecting Observation Cards

Once an observation card has been created on the Handheld and is synchronized to the PROMPTT® System, a manager needs to review each card and determine if the level of the observation is at the rig level or the company level and if the observation should be accepted or rejected.

Accepting an Observation Card

From the Main Menu, select Safety -> Observation cards.

The Observation Cards page appears.

One or more of the filters can be used to limit the number of observation cards displayed: ID, Time, Risk, JSA, JSA Description, Stopped, Location, Observed By, Reviewed by, or Status.

Click the Search button.

The search results are displayed.

Click on the ID or the status of the observation card that is to be reviewed. An observation card must be in a pending status to be reviewed.

The Observation Detail dialog box is displayed. It will show the area, behavior, safe value, at risk value, comments, and any solutions that were recorded at the rig on the Handheld.

Click either Rig Level or Company Level. Optionally, enter a comment as to why this card is being accepted.

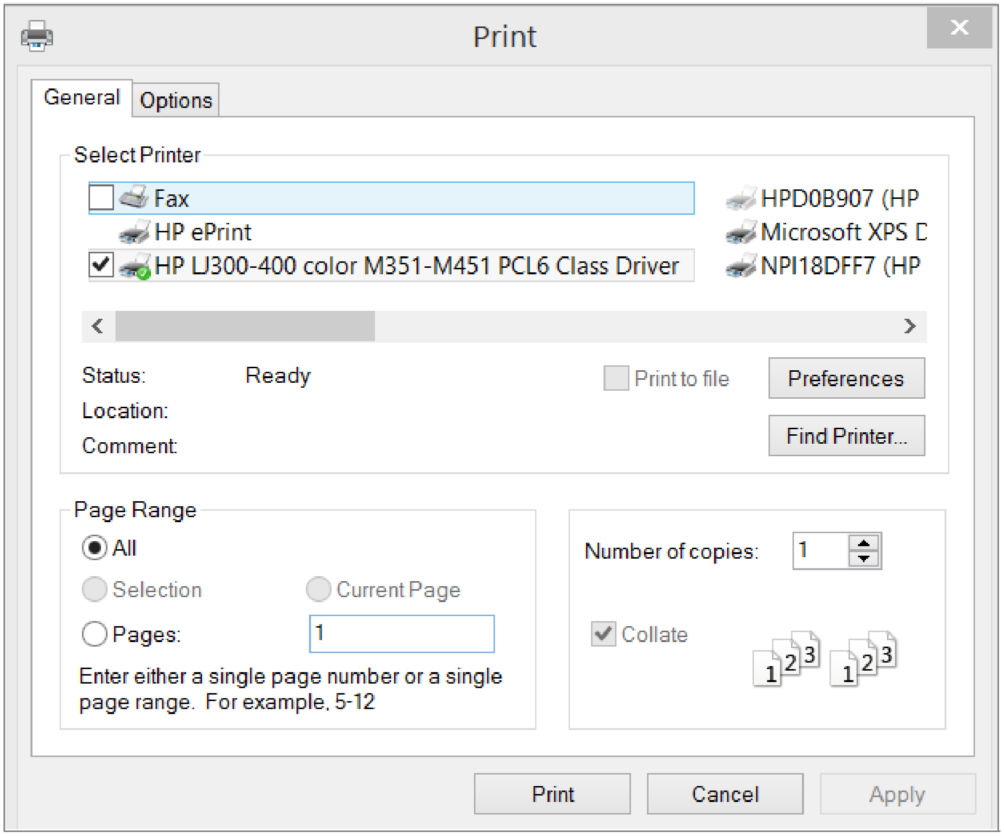
The approve button is enabled.

Click the Approve button. Once an observation has been approved, it cannot be modified.

The Observation Card can be printed from this dialog box.

Click the Print icon in the upper right corner.

The Print dialog box is displayed.



Print dialog box

Click the printer to select it and then click the Print button to print the observation, click the Cancel button to return to Observation Cards page without printing.

Click the Close button to return to the JSAs page.

Clicking the Close button will save the acceptance and return to the Observation Cards page. Clicking the X in the upper right corner of the dialog box will close the Observation Card without saving any changes.

Rejecting an Observation Card

From the Main Menu, select Safety -> Observation card.

The Observation Cards page appears.

One or more of the filters can be used to limit the number of observation cards displayed: ID, Time, Risk, JSA, JSA Description, Stopped, Location, Observed By, Reviewed by, Status.

Click the Search button.

The search results are displayed.

Click on the ID or the Status of the observation card that is to be reviewed. An observation card must be in a pending status to be reviewed.

The Observation Detail dialog box is displayed. It will show the area, behavior, safe value, at risk value, comments, and any solutions that were recorded at the rig on the Handheld.

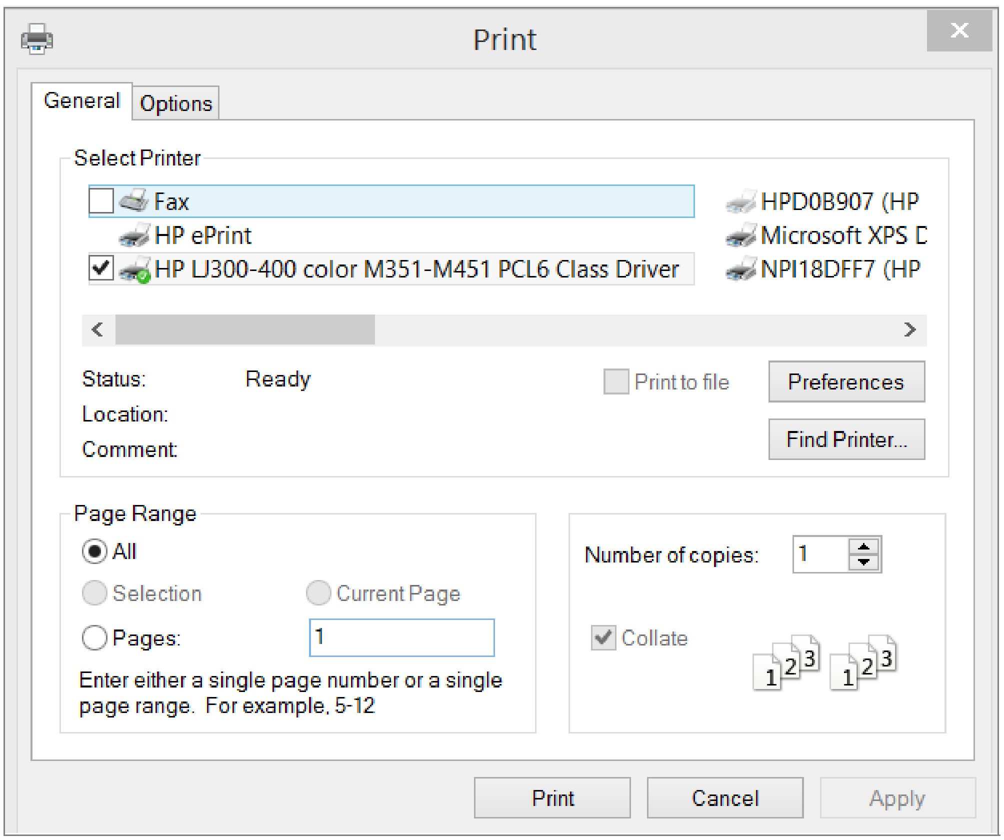
Optionally, enter a comment as to why this card is being rejected.

Click the Reject button. Once an observation has been rejected, it cannot be modified.

The Observation Card can be printed from this dialog box.

Click the Print icon  in the upper right corner.

The Print dialog box is displayed.



Print dialog box

Click the printer to select it and then click the Print button to print the observation, click the Cancel button to return to Observation Details dialog box without printing.

Clicking the Close button will save the acceptance and return to the Observation Cards page. Clicking the X in the upper right corner of the dialog box will close the Observation Card without saving any changes.

JSAs

A Job Safety Analysis (JSA) is performed on the Handheld or Tablet while at the rig. These are comprised of a series of questions that the user must answer. To see how to setup a JSA, see the JSA Management section.

Reviewing JSAs

From the Main Menu, select Safety -> JSAs.

The JSAs page is displayed.

Use one or more of the filters to determine which of the JSAs will be displayed. Leaving the filter blank will show all JSAs.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Started** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Select a location from the **Location** filter drop-down list.

Enter a name or a partial name of a JSA in the **JSA** filter.

Enter a value or partial value in the **Other** filter.

Enter a name or a partial name of a user in the **Leader** filter.

Enter a numeric value in the **User Count** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a numeric value, in minutes, in the **Total Time** filter.

Enter a name or a partial name of a user in the **Rig Manager** filter.

Select one or more statuses from the drop-down list for the **Status** filter.

Click the Search button to execute the search.

The results of the search are displayed.

JSAs page

To create a printable PDF file of the JSA, click the Select box for the JSAs to be printed, and click the Print button.

The system will prompt to Open, Save, or Cancel the print file. Click the Open button to view the print file in a PDF format, click the Save button to save the print file in the Downloads directory, or click the Cancel button to cancel the operation.

To export the data displayed on the page to an Excel file format, click the Export button.

The Search Pages section contains additional information about search pages.

Reviewing JSA Details

After performing a JSA search, click on the ID or the status of the JSA that is to be reviewed.

The JSA Detail dialog box is displayed. It has a header area that will show the name of the JSA, the ID, the Start and End dates and times, the total time spent completing the JSA, the status, the leader who performed the JSA, the rig manager, the driller, the third party counts, and the personnel.

Any images that were attached to the JSA are displayed. Clicking on the image will bring up the Attachments dialog and allow a closer look at the image. The arrows can be used to scroll through the images if there is more than one.

A list of all the JSA questions and the answers is displayed below the image.

The JSA can be printed from this dialog box.

Click the Print icon in the upper right corner.

The system will prompt to Open, Save, or Cancel the print file. Click the Open button to view the print file in a PDF format, click the Save button to save the print file in the Downloads directory, or click the Cancel button to cancel the operation.

Click the Close button to return to the JSAs page.

Meetings

Meetings are created on the Handheld to record the different types of meetings at a location. By using the Meetings module, the user is able to maintain information such as the number of attendees, the purpose of the meeting, and the start time and the end time.

Reviewing Meetings

From the Main Menu, select Safety -> Meetings.

The Meetings page is displayed.

Use one or more of the filters to determine which of the Meetings will be displayed. Leaving the filter blank will show all Meetings.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Started** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Ended** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Select a location from the **Location** filter drop-down list.

Select one or more meeting types from the drop-down list for the **Type** filter.

Enter a topic or partial topic of the meeting in the **Topic** filter.

Enter a name or a partial name of a user in the **Leader** filter.

Enter a numeric value in the **User Count** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a numeric value, in minutes, in the **Total Time** filter.

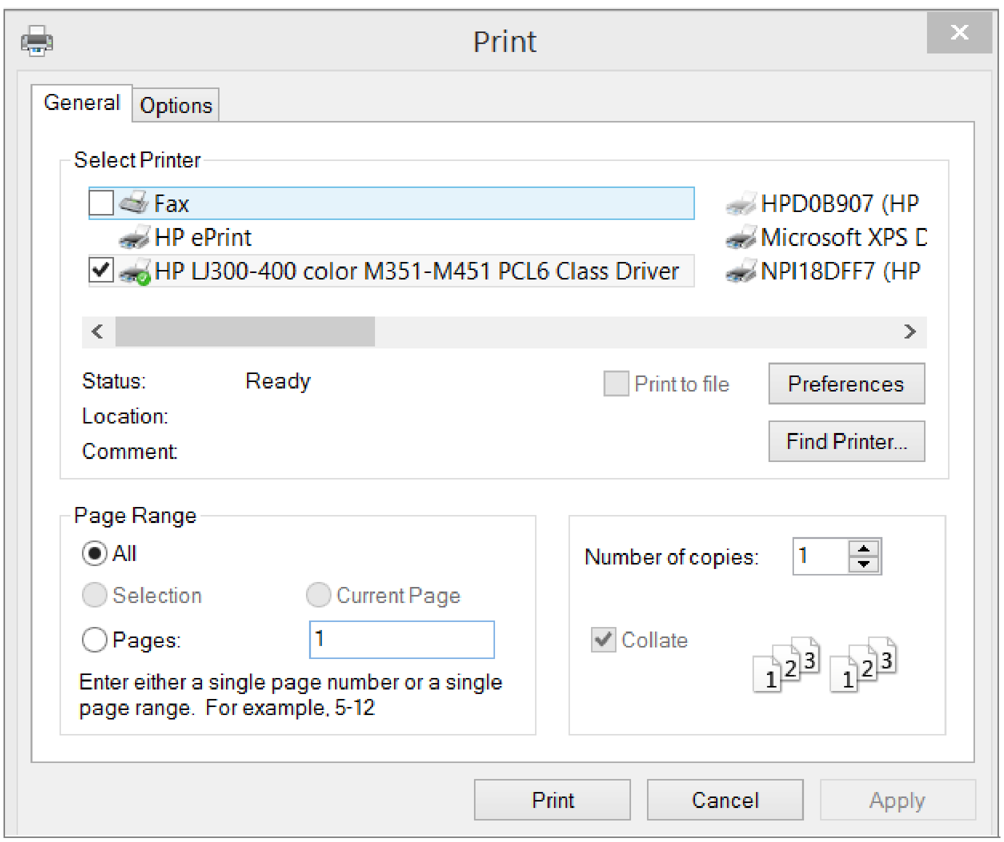
Select one or more statuses from the drop-down list for the **Status** filter.

Click the Search button to display the results of the search. A status of Incomplete will be shown in red and Complete will be shown in green.

Meetings page

To create a printable PDF file of the Meeting, click the Select box for the Meetings to be printed, and click the Print button.

The Print dialog box is displayed.



Print dialog box

Click the printer to select it and then click the Print button to print the meeting, click the Cancel button to return to Meetings page without printing.

The Search Pages section contains additional information about search pages.

Reviewing Meeting Details

After performing a meeting search, click on the ID or the status of the meeting that is to be reviewed.

The Meeting Detail dialog box is displayed. The header section shows the type of meeting, the date and time the meeting was started, the date and time the meeting ended, the total time spent on the meeting, the ID of the meeting, the location where the meeting was recorded, the leader of the meeting, the user count and whether the meeting was completed or not..

The Attendees pane shows the users who attended the meeting.

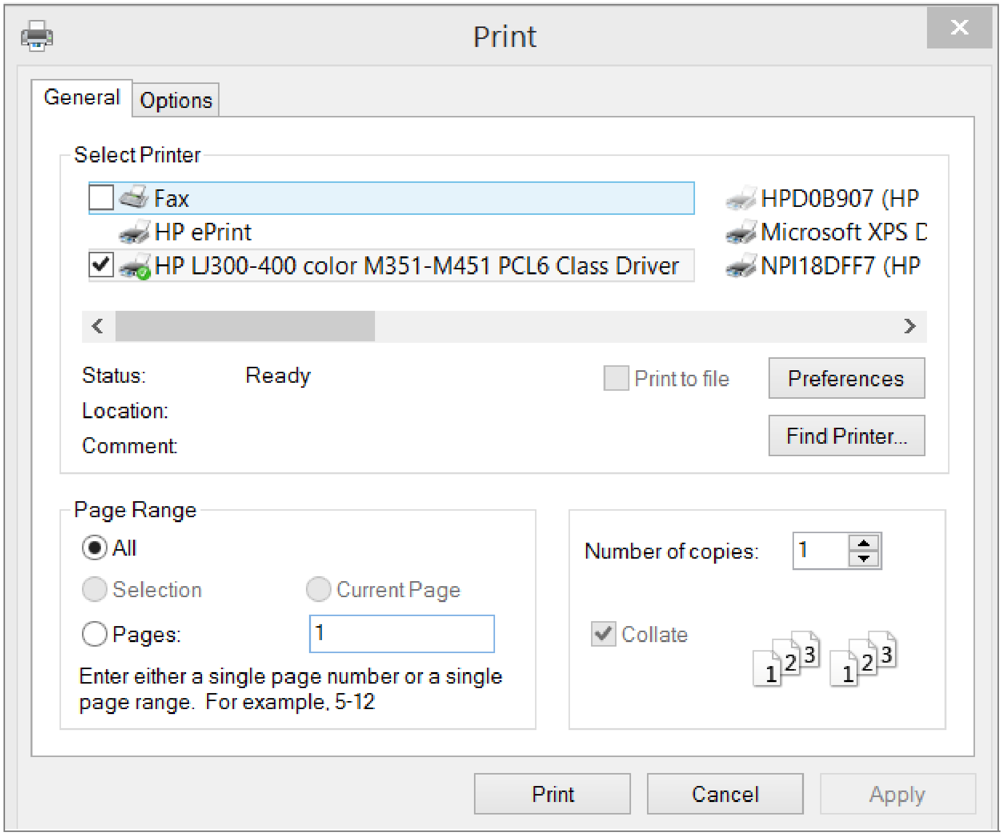
The Topic pane shows the topic of the meeting.

The Follow up pane shows any comments for a follow up meeting.

The meeting can be printed from this dialog box.

Click the Print icon in the upper right corner.

The Print dialog box is displayed.



Print dialog box

Click the printer to select it and then click the Print button to print the meeting, click the Cancel button to return to Meetings Detail dialog box without printing.

Click the Close button to return to the Meetings page.

Operational Events

Operational events are created on the Handheld to record any safety events that are found at the site.

Reviewing Operational Events

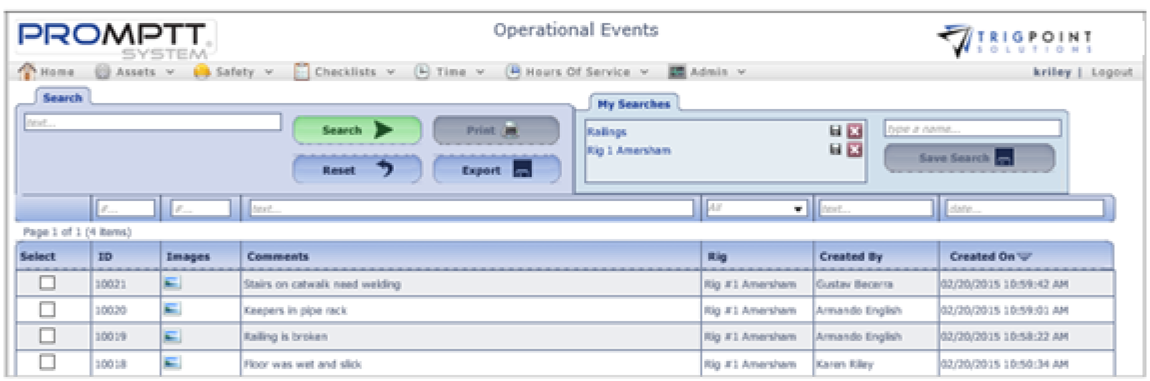
From the Main Menu, select Safety -> Operational Events.

The Operational Events page is displayed.

Use one or more of the filters to determine which of the Operational Events will be displayed. Leaving the filter blank will show all Operational Events.

> Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.
>
> Enter a numeric value in the **Images** filter. Entering a “1” will select all Operational event s that have one image, entering a “2” will select all Operational events that have two images, etc. The less than, greater than or equals symbol can be used in conjunction with the value.
>
> Enter a comment or partial comment in the **Comments** filter.
>
> Select one or more locations of location type rig from the drop-down list for the **Rig** filter.
>
> Enter a name or a partial name of a user in the **Created By** filter.
>
> Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Created On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button to display the results of the search.



Operational Events page

To create a printable PDF file of the Operational Event, click the Select box for the Operational Events to be printed, and click the Print button.

The system will prompt to Open, Save, or Cancel the print file. Click the Open button to view the print file in a PDF format, click the Save button to save the print file in the Downloads directory, or click the Cancel button to cancel the operation.

Clicking on the image icon will bring up the Attachments dialog box and allow a closer look at the image. The arrows can be used to scroll through the images if there is more than one.

The Search Pages section contains additional information about search pages.

Checklists

Checklists are any type of work or activity that needs to be performed on demand. A checklist is completed on the web, in the PC/Tablet application, or on the handheld device and the results uploaded to the server for later review and analysis.

Checklist Answers

Reviewing Checklist Answers

From the Main Menu, select Checklists-> Checklists.

The Checklist page appears.

Use one or more of the filters to determine which of the checklists will be displayed. Leaving the filter blank will show all checklists.

In the **ID** filter, enter an ID or partial ID.

Enter a numeric value in the **Images** filter. Entering a “1” will select all checklists that have one image, entering a “2” will select all checklists that have two images, etc. The less than, greater than or equals symbol can be used in conjunction with the numeric value.

Select one or more types from the **Type** filter.

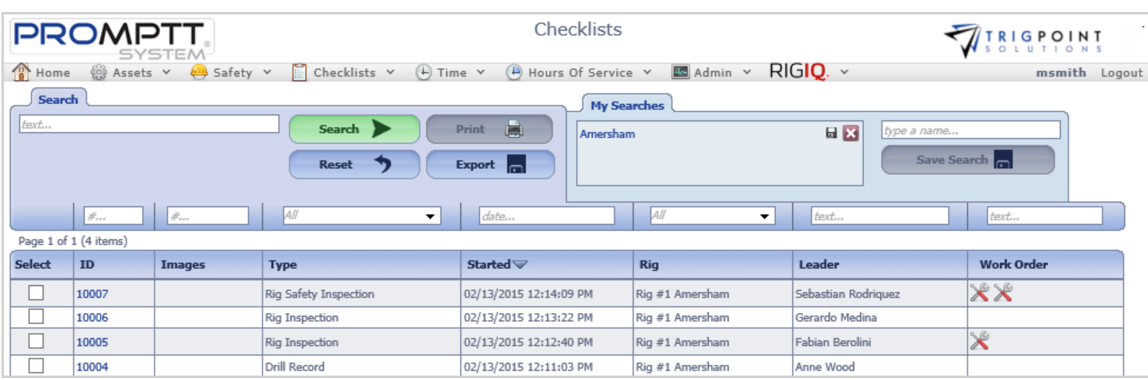
Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Started** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Select one or more rigs from the drop-down list for the **Rig** filter.

Enter a name or partial name in the **Leader** filter.

Enter a work order description or part of a work order description in the **Work Order** filter.

Click the Search button to display the results of the search.



Checklist page

The Search Pages section contains additional information about search pages.

Click an ID to display the answer detail for the checklist. The Detail pane includes the checklist ID, the type of checklist, the date and time the checklist was started, the date and time the checklist was ended, the location, and the name of the leader of the checklist.

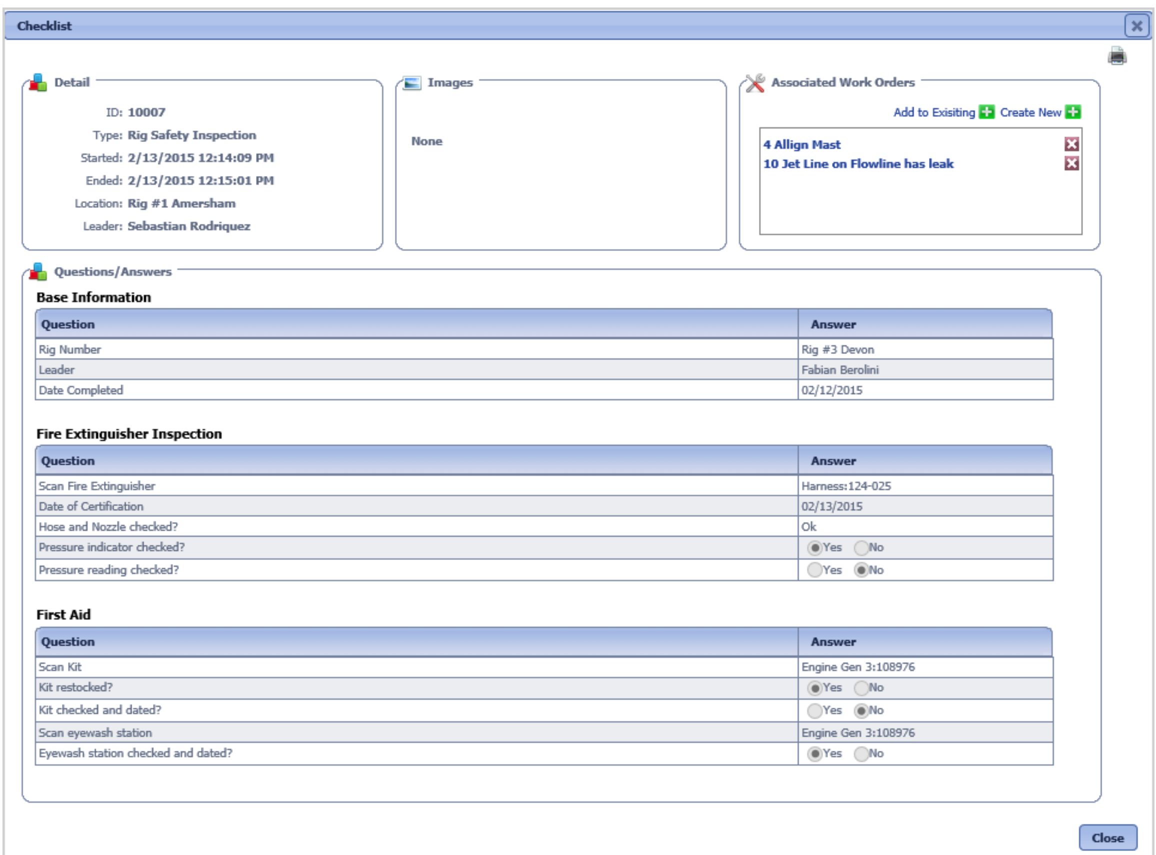
Any images that were attached to the checklist are displayed in the Image pane. Clicking on the image will bring up the Attachments dialog box and allow a closer look at the image. The arrows can be used to scroll through the images if there are more than one.

The Questions/Answers pane displays all the questions and their answers.

The checklist can be printed from this dialog box by clicking the Print icon in the upper right-hand corner.

The system will prompt to Open, Save, or Cancel the print file. Click the Open button to view the print file in a PDF format, click the Save button to save the print file in the Downloads directory, or click the Cancel button to cancel the operation.

Click the Close button to return to the Checklist page.



Checklist Detail dialog box

Checklist Execution

Selecting a Checklist to Execute

From the Main Menu, select Checklists-> Checklist Execution.

The Checklist Execution page is displayed.

Use one or more of the filters to determine which of the checklists will be displayed. Leaving the filter blank will show all checklists.

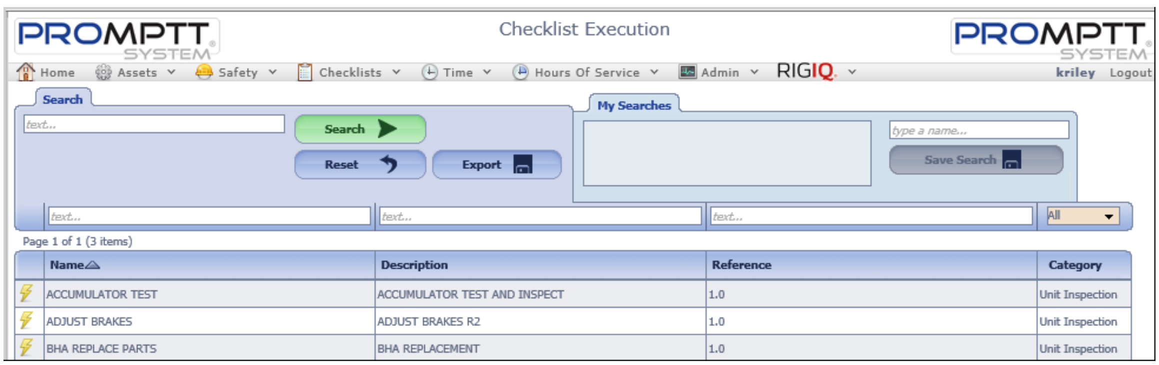
Enter a name or partial name of a checklist in the **Name** filter.

Enter a description or partial description of a checklist in the **Description** filter.

Enter a reference or partial reference in the **Reference** filter.

Select one or more categories from the drop-down list for the **Category** filter.

Click the Search button to display the results of the search.



Checklist page

The Search Pages section contains additional information about search pages.

Clicking the lightning bolt icon will display the Checklist dialog box.

Executing the Checklist

In the Detail pane of the checklist, select a location. The location will automatically default to the user's assigned location.

Click the Add icon for Attach in the Attachments pane to add any attachments to the checklist.

Mandatory questions on the checklist will have an asterisk(*) before the question. The Complete button will not become enabled until all of the mandatory questions have been answered.

The checklist questions are displayed in groups.

Groups that have the Multi-group in the checklist template set to a value between 2 and 10 will display the group that many of times. There will be a group number indicator after each group, showing the group number out of the total number of groups.

Groups that have the Multigroup set to Unlimited will have the Add icon after the group name. Clicking the Add icon will add the group to the checklist instance. As each group is added, the Add icon will then be moved to the last instance of the group. This allows the user to add the group to the checklist as many times as is necessary. There will be a group number indicator after each group, showing the group number out of the total number of groups.

There are sixteen types of questions that can be asked on a checklist.

A **Confirm** question will display a checkbox with OK. Click the box for a positive answer.

A **Yes/No** question will display a radio button for Yes and a radio button for No. Select the correct response to the question.

A **Date** question will display a calendar when clicked. Use the arrows to move between months and years on the calendar to find the correct date. Click on the day to enter the date . A date can also be manually entered in the format *mm/dd/yyyy* where *mm* is the month, *dd* is the day and *yyyy* is the four-digit year.

A **Numeric** question will display a text box that will only accept numeric values. Enter the correct numeric value.

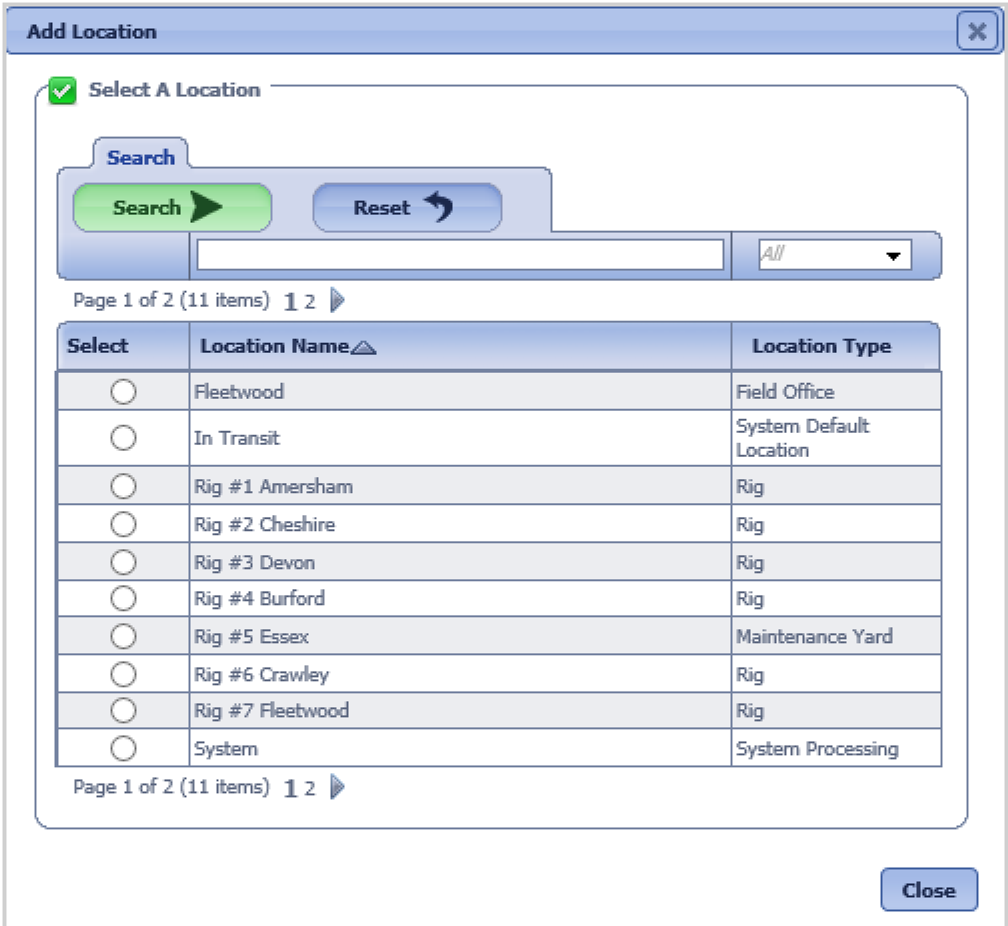
A **Text** question will display a text box that will accept alphanumeric values. Enter up to a 200-character answer.

A **List** question will display a drop-down list. Click on the correct element in the list to answer the question.

A **List-Multiple** question displays a drop-down list that will accept multiple answers. Mark one or more of the check boxes in front of each list element.

A **Location** question displays an Add icon to add the location.

Click the Add icon for Add location. The Add Location dialog box is displayed.



Add Location dialog box

Use the Location Name or Location Type to limit the number of locations to be displayed. Leaving the filters blank will select all parent locations.

Click the Search button to perform the search. Click the Reset button to set the search back to its original values.

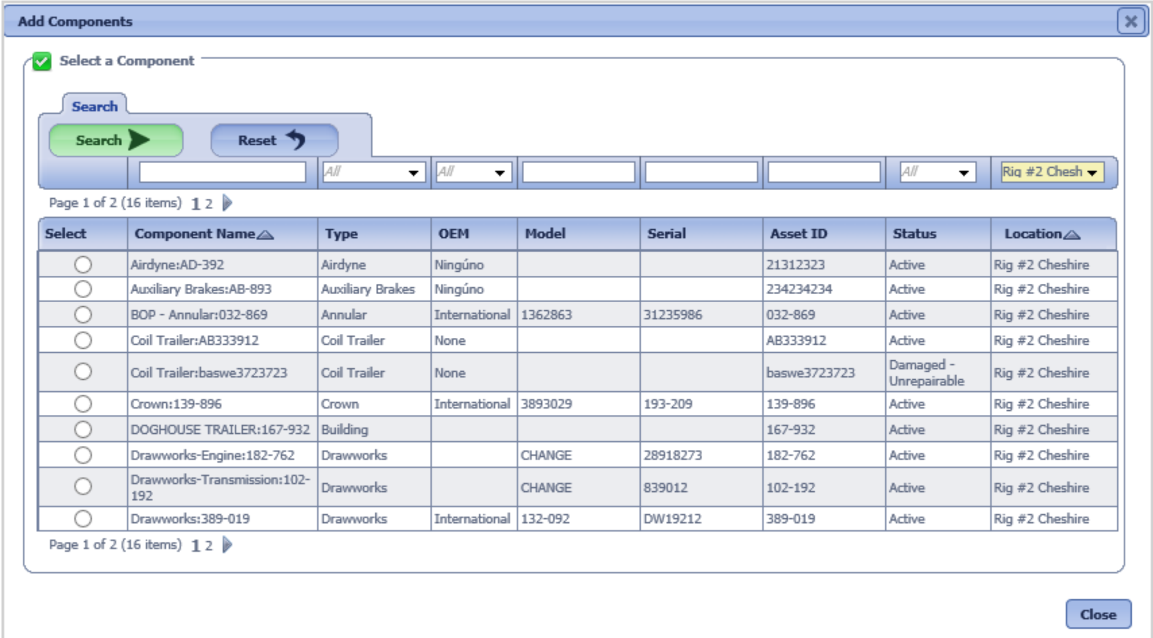
The system displays the lists of locations that match the entered search criteria.

Either of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Click the Select box for the parent location to be used to answer the question and return to the Checklist dialog box, click the Close button to return to the Checklist dialog box without adding a location.

A **Component** question displays an Add icon to add the component.

Click the Add icon for Add Component. The Add Components dialog box is displayed.



Select	Component Name	Type	OEM	Model	Serial	Asset ID	Status	Location
	Airdyne:AD-392	Airdyne	Ningúno			21312323	Active	Rig #2 Cheshire
	Auxiliary Brakes:AB-893	Auxiliary Brakes	Ningúno			234234234	Active	Rig #2 Cheshire
	BOP - Annular:032-869	Annular	International	1362863	31235986	032-869	Active	Rig #2 Cheshire
	Coil Trailer:AB333912	Coil Trailer	None			AB333912	Active	Rig #2 Cheshire
	Coil Trailer:baswe3723723	Coil Trailer	None			baswe3723723	Damaged - Unrepairable	Rig #2 Cheshire
	Crown:139-896	Crown	International	3893029	193-209	139-896	Active	Rig #2 Cheshire
	DOGHOUSE TRAILER:167-932	Building				167-932	Active	Rig #2 Cheshire
	Drawworks-Engine:182-762	Drawworks		CHANGE	28918273	182-762	Active	Rig #2 Cheshire
	Drawworks-Transmission:102-192	Drawworks		CHANGE	839012	102-192	Active	Rig #2 Cheshire
	Drawworks:389-019	Drawworks	International	132-092	DW19212	389-019	Active	Rig #2 Cheshire

Add Components dialog box

Use one or more of the following filters to limit the number of components to be displayed: Component Name, Type, OEM, Model, Serial, Asset ID, Status, or Location. The location filter will default to the checklists' location; this can be changed to select components from other locations. Leaving the filters blank will select all components for the selected location.

Click the Search button to perform the search. Click the Reset button to set the search back to its original values.

The system displays the lists of components that match the entered search criteria.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Click the Select box for the component to be used to answer the question, or click the Close button to return to the Checklist dialog box without adding a component.

A **Signature** question displays a signature box. Use the mouse to draw the signature.

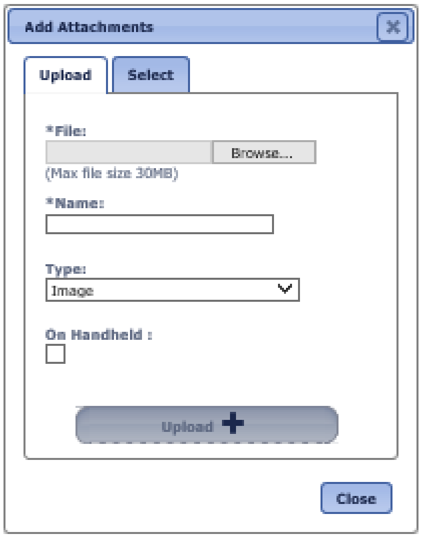
A **User** question display a drop-down list of users. Click on one user in the list to answer the question.

A **User-Multiple** question displays a drop-down list that will accept multiple answers. Mark one or more of the check boxes in front of each user selected.

An **Image** question displays an Add icon to add an image.

Click the Add icon for Add Image.

The Add Attachments dialog box is displayed.



Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

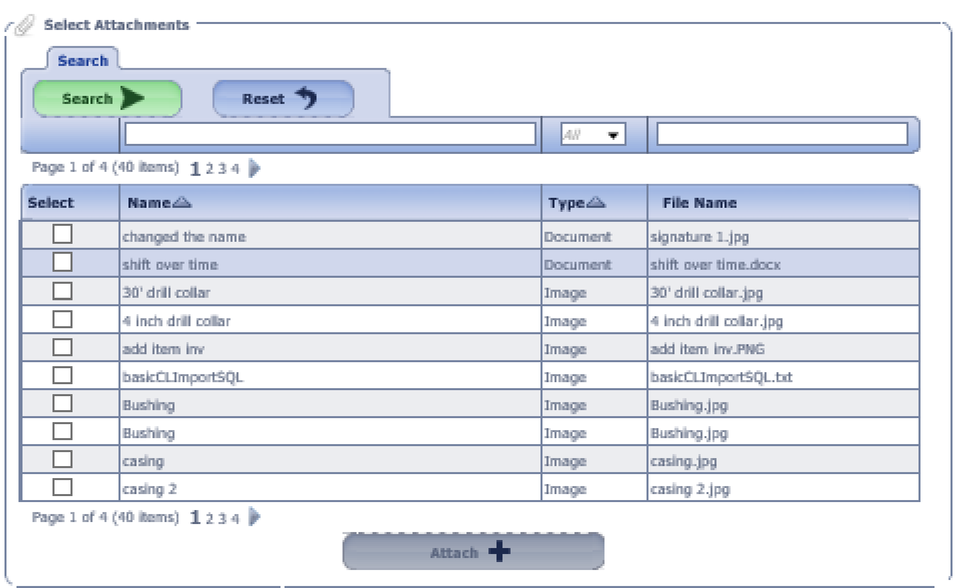
Enter the Name and select the type of attachment.

If the attachment is an image that is to be synchronized to the Handheld, click the On Handheld box.

Click the Upload button. Click the Browse button to add another attachment or click the Close button to return to the Attachments tab.

The attachment is now associated with the checklist answer.

To add an existing image, click the Select tab.



Add Attachments dialog box – Select

The Select Attachments dialog box is displayed with a list of attachments.

Use one or more of the following filters to determine the attachments to be displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for any attachments on the page that are to be added to the item, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

The attachment is now associated with the item.

To delete an attachment, click the Delete icon to right of the attachment.

For an **Auto User** question there will be no question asked; the answer will default to the user answering the checklist. Non-editable

For an **Auto Date** Time question, there will be no question asked; the answer will default to the current date and time. Non-editable

For an **Auto Location** question, there will be no question asked; the answer will default to the handheld location. Non-editable

When all the mandatory questions are answered, the Complete button is enabled. The Complete button should not be clicked until all questions have been answered and reviewed; the answers can no longer be edited once the checklist is marked as complete.

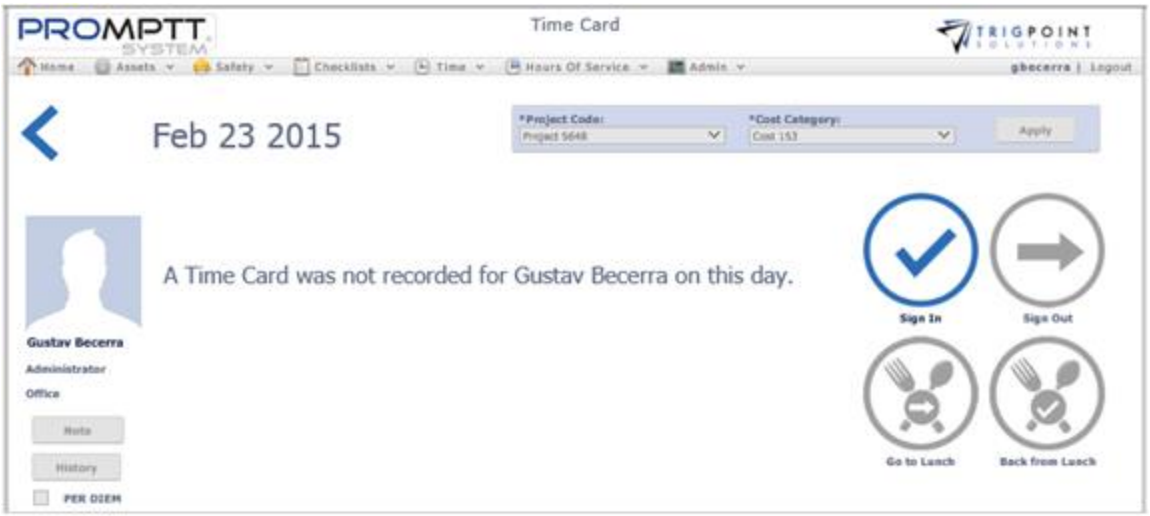
Clicking the Complete button marks the checklist as complete and returns the user to the Checklist Execution page. Clicking the Cancel button will return the user to the Checklist Execution page without saving the answers.

Time Capture

Individual Entry on the Website

From the Main Menu, select Time -> Time Card.

The Time Card page will be displayed.



Time Card page

The date for which the time is being tracked is displayed in the top left corner of the page. Clicking on the left arrow will move the date back by a day.

The Project Code and Cost Category default to the values set up in the department. A different Project Code or Cost Category can be selected from the drop-down list. These codes can be changed for the user at any time.

Not all codes are used in all departments. For some departments, these codes are locked and cannot be changed.

Click the Sign In icon .

A Per Diem check box will be displayed if the user's department is eligible for per diem pay. When this is clicked, the user will be marked for per diem pay.

Depending on how the department the user is assigned to is setup, one or more pre-work questions may be asked. Select the answer for any questions that are asked. If any questions are answered negatively, a warning message will appear with instruction and in some cases may stop the user from entering any time. These questions may vary based upon the user's department.

To record meal times, click the Go To Lunch icon. Once this has been selected, the Back from Lunch icon will become activated.

When the user has returned, select the Return from Lunch icon. The system defaults to the project code and cost category that was used prior to lunch. If this is not the correct project code or cost category, after returning the users from lunch, change the project code or cost category.

At the end of the day, select the Sign Out icon. Depending on how the department is setup, a set of Post Work Questions will be asked and must be answered in order to sign out. If any questions are answered negatively, a warning message will appear with instruction. These questions may vary based upon the user's department.

Once the user has signed out, the supervisor will need to use the Daily Time Card Approval to approve the time card.

Time Card Approval

Time Card Daily Approval

For any time cards that have been entered through the website or as individuals on the tablet/PC application, the supervisor will need to perform a daily approval of the time cards.

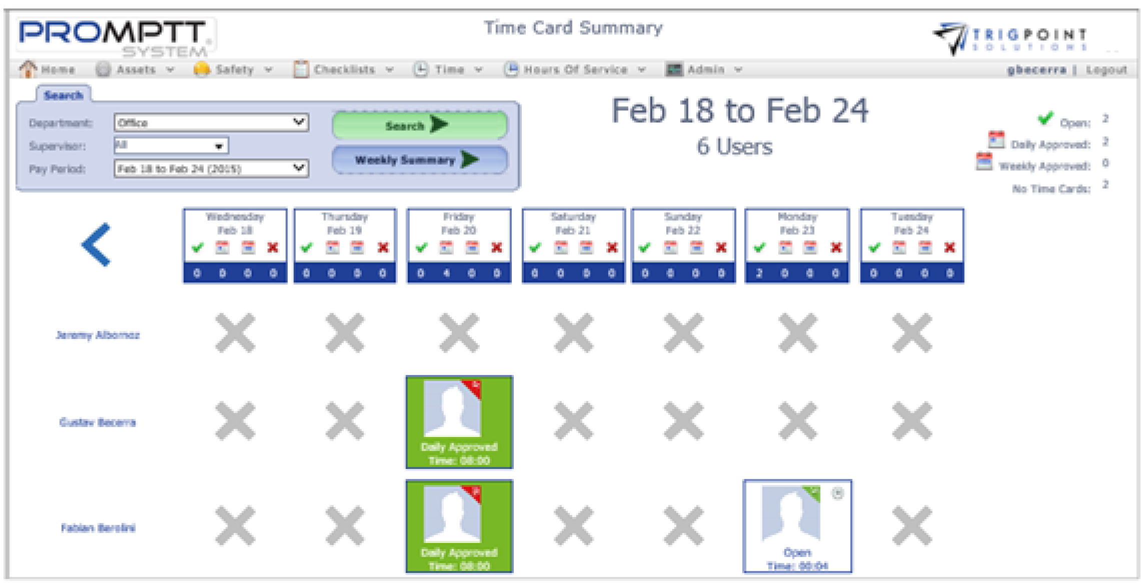
From the Main Menu, click Time -> Time Card Approval.

The Time Card Summary page is displayed. The search criteria will default to the current pay period, the location of the person logged in, and the supervisor of the person logged in.

From the Time Card Summary page, select the Department, Supervisor, and Pay Period that is to be approved.

Click the Search button.

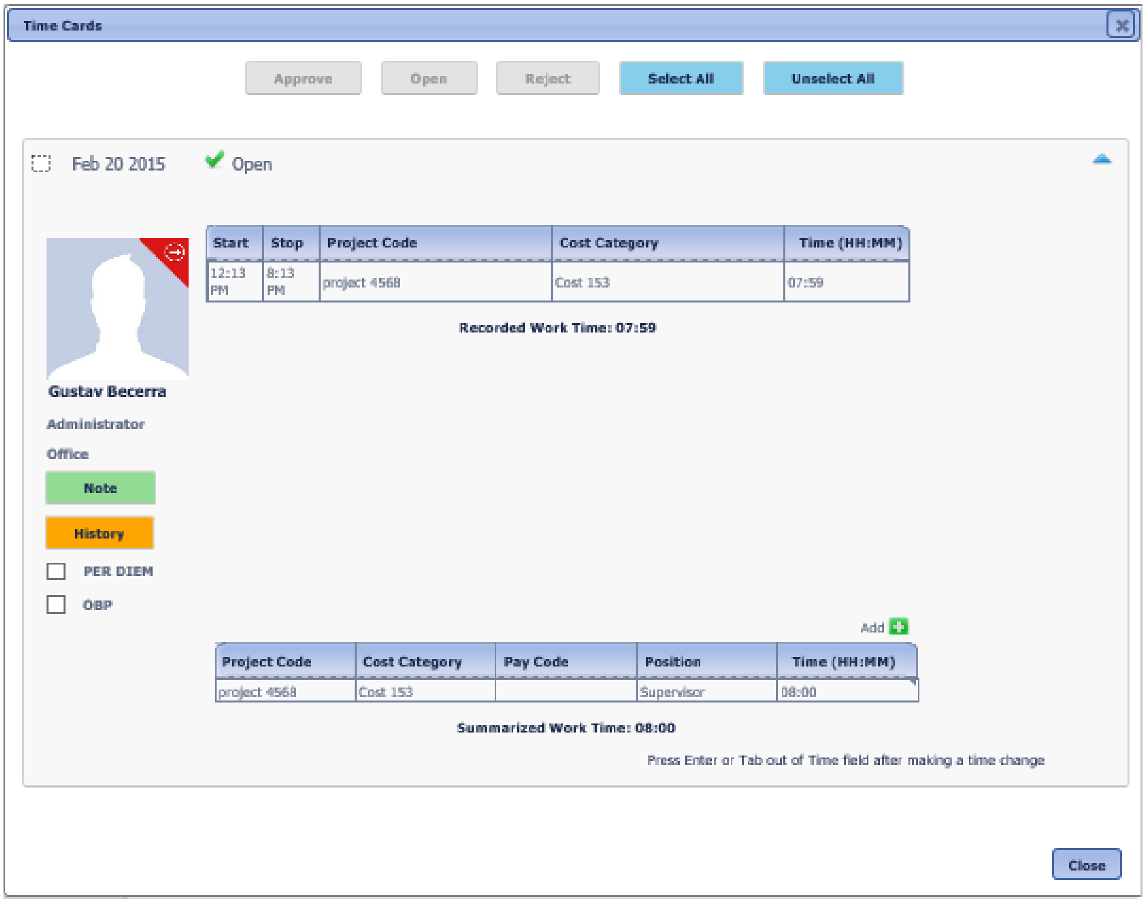
The search results are displayed.



Time Card Summary page

Click the time card for the date and user that is to be approved.

The Time Cards dialog box is opened.

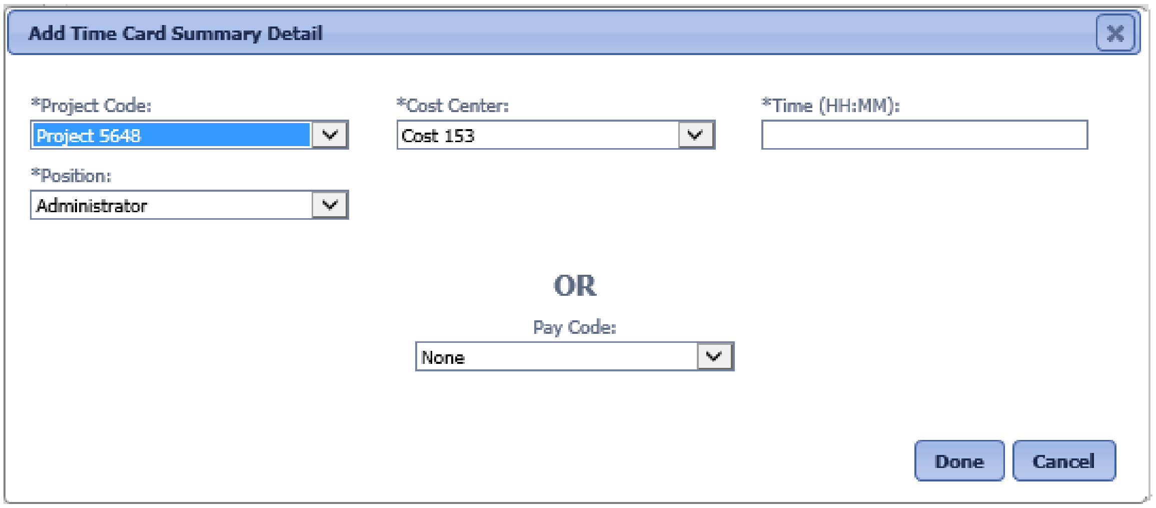


Time Cards dialog box

The Summarized Work Time will default to the Recorded Work Time. The time may be changed by using the inline editing feature. Click on the time data cell that is to be changed, enter the time in hours and minutes, separated by a colon. Press the Tab or Enter key to save the changes, or click on another data cell instead of the Tab or Enter key to cancel the change.

To add time to the Summarized Work Time click the Add icon in the upper right corner of the Summarized Work Time.

The Add Time Card Summary Detail dialog box is displayed.



Add Time Card Summary Detail dialog box

Enter the Project Code, Cost Center, and Position, or enter the Pay Code. Enter the time in hours and minutes, separated by a colon.

Click the Done button to save the changes and return to the Time Cards dialog box or click the Cancel button to return without making the addition.

Check the Per Diem or the Oil Based Pay (OBP) to mark the user as receiving per diem or OBP.

When the time is correct on the time card, click the select checkbox in the upper right-hand corner of the time card and click the Approve button to daily approve it or click the Reject button to reject it. Rejected time cards will not be appear in the Weekly Summary or in the Payroll Administration process.

If a time card is approved by mistake, or if a change needs to be made after it has been daily approved, click the select checkbox in the upper right-hand corner of the time card and click the Open button.

To see all time cards for the user, click the name on the left side of the page.

All the time cards for the user for that week are displayed and can be edited in the same manner as an individual time card.

The different time cards can be approved in a group or individually. To approve or reject a time card individually, click on the check box to the left of the date and then click the Approve or Reject button. To approve or reject a group of time cards, click the Select All button and then click the Approve or Reject button.

To see all time cards for that day, click on the date header.

All the time cards for the user for that week are displayed and can be processed in the same manner as an individual time card.

The different time cards can be approved in a group or individually. To approve or reject a time card individually, click on the check box to the left of the date and then click the Approve or Reject button. To approve or reject a group of time cards, click the Select All button and then click the Approve or Reject button.

Weekly Time Card Approval

Once all the time cards have been approved for a department, the supervisor must perform a weekly approval. It is during the weekly approval that overtime hours will be determined and other department time rules applied. For departments that have a value greater than zero in the Added Minutes field, these minutes will be added for any day a user worked as part of the Weekly Time Card Approval process.

From the Main Menu, click Time -> Time Card Approval.

The Time Card Summary page appears. The search criteria will default to the current pay period, the location of the person logged in, and the supervisor of the person logged in.

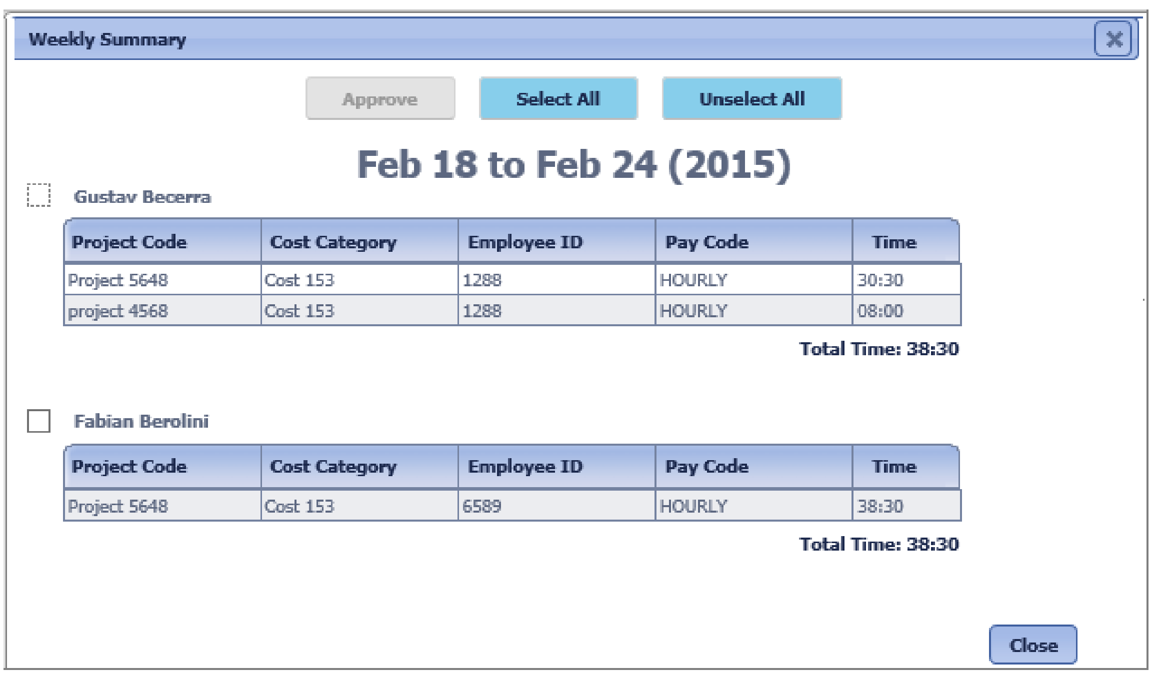
From the Time Card Summary page, select the Department, Supervisor, and Pay Period that is to be approved.

Click the Search button.

The search results are displayed.

To perform a weekly approval, click the Weekly Summary button.

The weekly summary for users shown in the search will be displayed in the Weekly Summary dialog box.



Weekly Summary dialog box

Users must have all of their time cards for the week approved before they will be shown in the weekly summary.

Users can be weekly approved in a group or individually. To approve an user individually, click on the check box to the right of the user's name and then click the Approve button. To approve a group of users, click the Select All button and then click the Approve button.

Reverting Weekly Summary

When a time card is added for an user after the Weekly Summary has been run, it is necessary to revert the time cards that had the weekly summary approved previously prior to processing the payroll.

From the Main Menu, select Time -> Time Card Approval.

The Time Card Summary page is displayed. It will default to the current pay period, the location of the person logged in, and the supervisor of the person logged in.

Select the Department, Supervisor, and Pay Period to be reverted.

Click the Search button.

The search results are displayed.

Click on the user's name.

The Time Card Summary Detail dialog box is displayed.

At the top of the dialog box, click on the link Revert Weekly Approved Time Card.

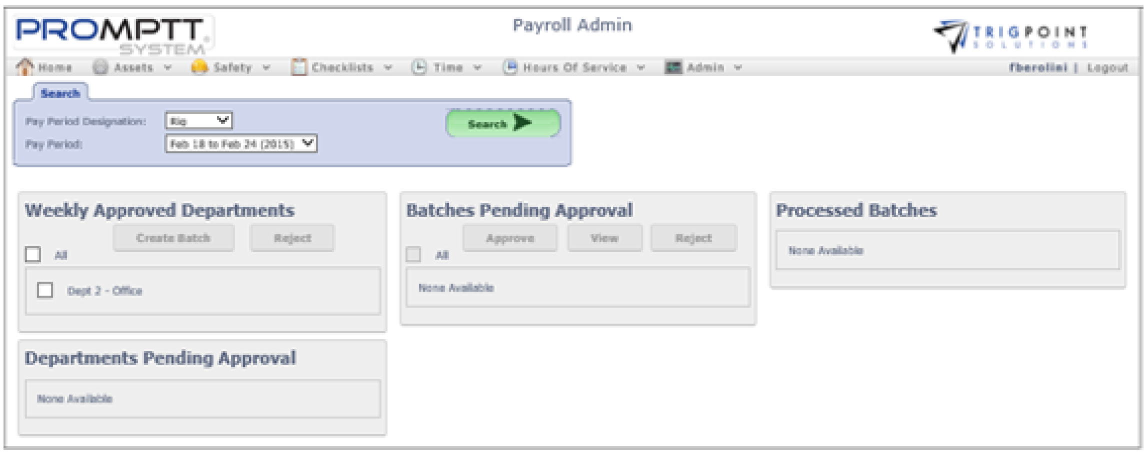
The status of the user's time card is set to Daily Approved. The Weekly Summary will need to be rerun for the user.

Payroll Administration

To finish processing payroll, the payroll administration must be run. This will create the CSV export file that can be exported to an external system outside of the PROMPTT® System.

From the Main Menu, select Time -> Payroll Admin.

The Payroll Admin page is displayed. It will default to the current pay period and the Pay Period Designation of General. The Pay Period Designation is set by department.



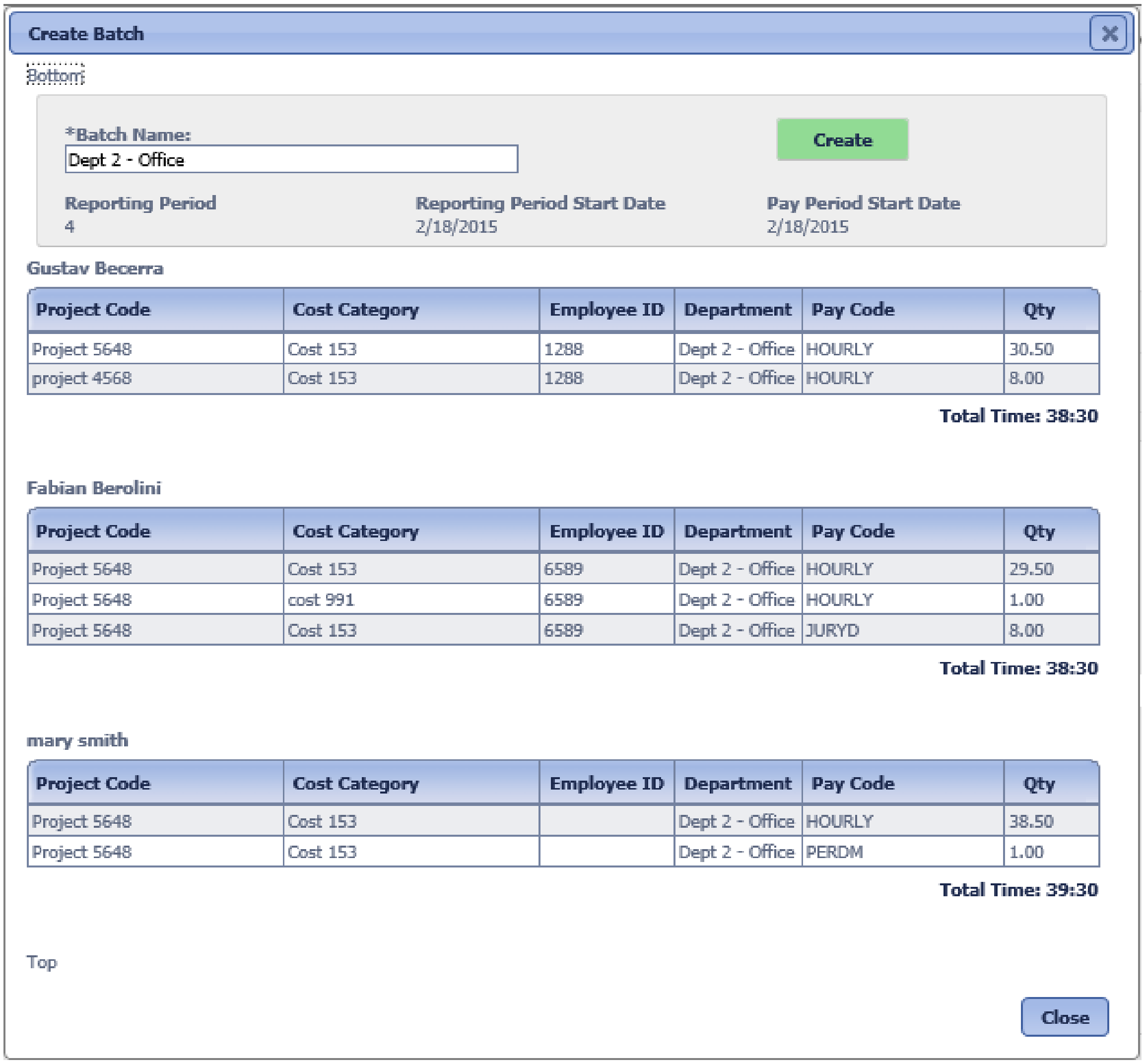
Payroll Admin page

The Weekly Approved Departments pane will show a selection of departments that are eligible to have Payroll Admin run. For a department to be eligible for Payroll Admin, all time cards for the payroll week must have been weekly approved.

To run Payroll Admin for a department and pay cycle, click the checkbox to the left of the department in the Weekly Approved Department pane.

Click on the Create Batch button. It is recommended that only one Department be worked at a time.

The Create Batch dialog box will be displayed



Create Batch

Bottom

*Batch Name: Dept 2 - Office

Create

Reporting Period	Reporting Period Start Date	Pay Period Start Date
4	2/18/2015	2/18/2015

Gustav Becerra

Project Code	Cost Category	Employee ID	Department	Pay Code	Qty
Project 5648	Cost 153	1288	Dept 2 - Office	HOURLY	30.50
project 4568	Cost 153	1288	Dept 2 - Office	HOURLY	8.00

Total Time: 38:30

Fabian Berolini

Project Code	Cost Category	Employee ID	Department	Pay Code	Qty
Project 5648	Cost 153	6589	Dept 2 - Office	HOURLY	29.50
Project 5648	cost 991	6589	Dept 2 - Office	HOURLY	1.00
Project 5648	Cost 153	6589	Dept 2 - Office	JURYD	8.00

Total Time: 38:30

mary smith

Project Code	Cost Category	Employee ID	Department	Pay Code	Qty
Project 5648	Cost 153		Dept 2 - Office	HOURLY	38.50
Project 5648	Cost 153		Dept 2 - Office	PERDM	1.00

Total Time: 39:30

Top

Close

Create Batch dialog box

The Batch Name field will default to the department name but can be changed. Once the name has been entered, click the Create button to create the batch for the selected department.

The Export button will become enabled.

Clicking the Export button will create a CSV file that can be transmitted to an external system.

A dialog box is displayed, asking if you want to open or save the file.

Click the Open button to open the file, click the Save button to designate a location to save the file, or click the Cancel button to return to the Create Batch dialog box without saving or opening the file.

The batch with the assigned batch name is displayed in the Batches Pending Approval pane. The batch can be approved, viewed, or rejected.

To approve the batch, click the checkbox to the left of the batch name and click the Approve button. Once the batch is approved, it will appear in Processed Batches pane and it cannot be changed. The process can then begin again for any other departments that have been Weekly Approved.

To view the batch, click the checkbox to the left of the batch name and click the View button. The Batch dialog box will be displayed and the Export button may be used to create the CSV file.

To reject the batch, click the checkbox to the left of the batch name and click the Reject button. Rejecting the batch will move all the time cards in it back to a Daily Approved status. They can then be corrected and the Weekly Summary rerun.

Administrative Functions

The administrative functions are used by system administrators to configure functionality for the system.

Notifications

Notifications are system-generated alerts that highlight specific events within the system. An example of notifications would be a component detail has been changed, a task is overdue, or a component has been scanned at an unexpected location.

Notifications can also be emailed or texted to a user through subscriptions. Please see the Subscriptions section to see how to set these up.

Reviewing Notifications

From the Main Menu, select Admin-> Notifications.

The Notification Search page appears.

To see notifications by module, select one or more modules from the drop-down list for the Modules filter.

To see notification by a group, select one or more groups from the drop-down list for the Group filter.

To see notification by a notification type, select one or more types from the drop-down list for the Type filter.

To see notification by a task profile, select one or more task profiles from the drop-down list for the Task Profile filter.

To show notifications that are more than two weeks old, mark the checkbox for History.

Use one or more of the filters to determine which of the notifications will be displayed. Leaving the filter blank will show all notifications.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **UTC Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and then select a date and time from the calendar in the **Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter a notification or partial notification for the **Notification** filter.

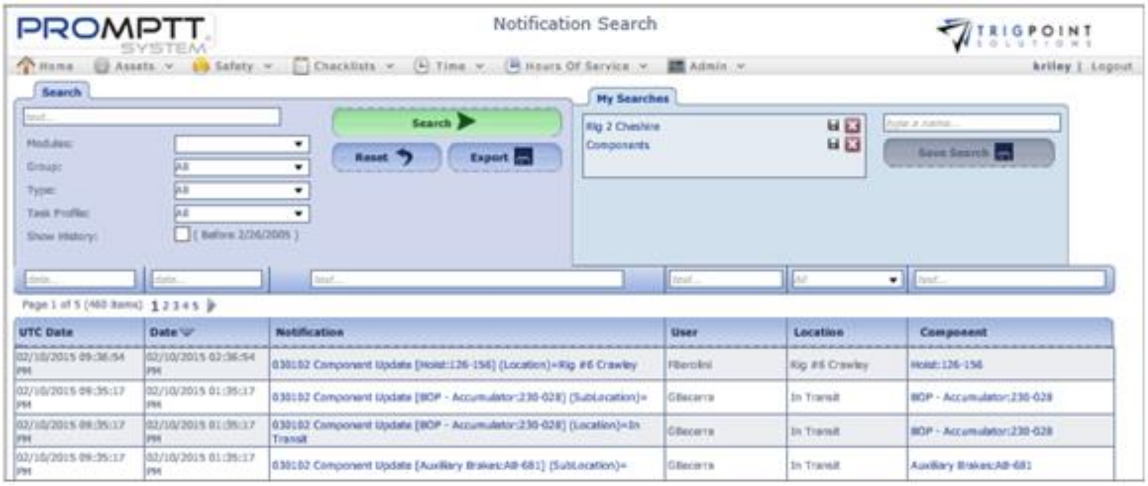
Enter a name or a partial name of a user in the **User** filter.

Select one or more locations from the **Location** filter drop-down list.

Enter a name or a partial name of a component in the **Component** filter.

Click the Search button.

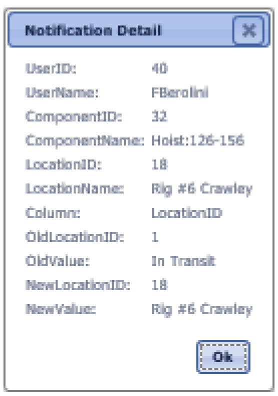
The results of the search are displayed.



Notification Search page

The Search Pages section contains additional information about search pages.

Click the notification to display the notification details. The details will vary depending on the notification type.



Notification Detail dialog box

Click the component name to view the component details.

Users

Users are the people that use the PROMPTT® System and includes Handheld, website, and PC App users. Users can have unlimited amounts of flexible details associated with them.

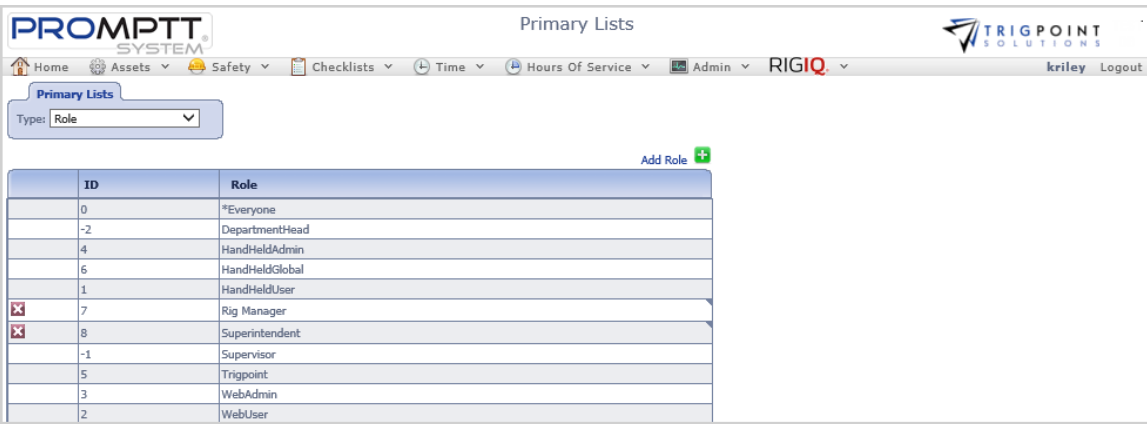
Roles

Roles are used to determine user access to the system when configuring security and are used to subscribe to configured subscription notifications. The system comes with basic roles and their corresponding security preloaded. Roles are maintained in the primary lists and the user can then add any additional roles that are required.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

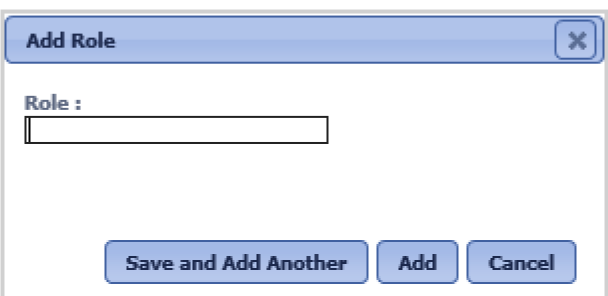
Select Roles in the Type drop-down list.



Primary Lists page – Role

Click the Add icon for Role.

The Add Role dialog box is displayed.



Add Role dialog box

Enter a Role of up to 50 characters.

Click the Save and Add Another button to add another Role, click the Add button to save the Role and return to the Primary Lists page, or click the Cancel button to return to the previous page without saving any changes.

Roles are modified using the inline editing feature. Only roles that were not preloaded by the system can be modified. If the role can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

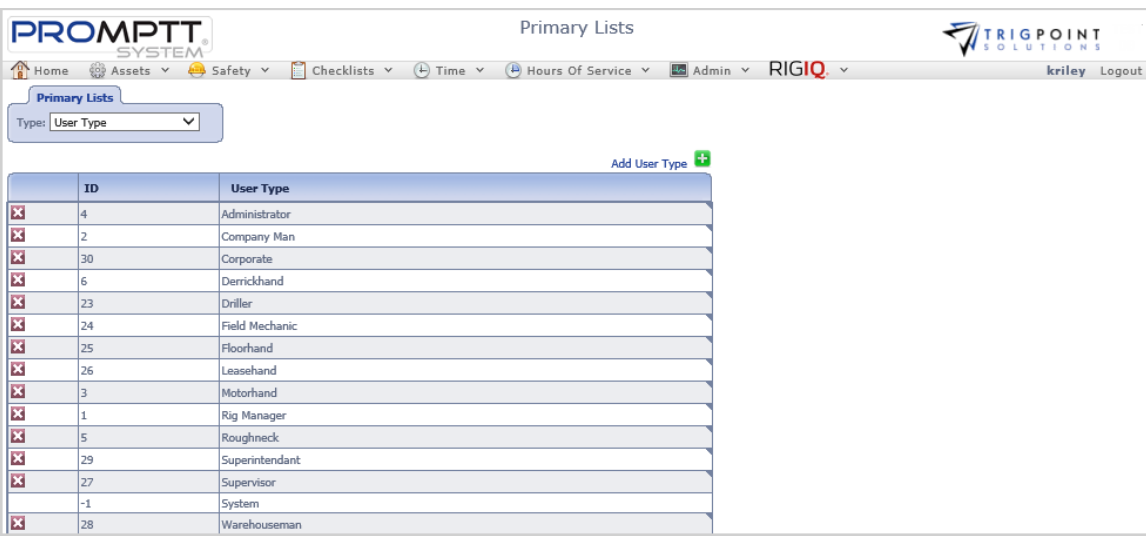
User Types

User Types or positions are used to sort and select user in reports. User Type is also used to determine in which drop-down lists a user will be displayed. For example, only users with a specific role will be displayed in the rig manager drop-down list when entering a JSA. User Types are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

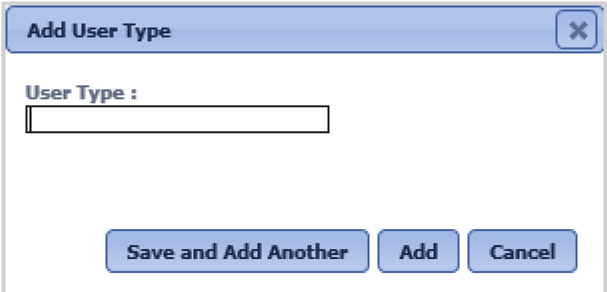
Select User Types in the Type drop-down list.



Primary Lists page – User Type

Click the Add icon for User Type.

The Add User Type dialog box is displayed.



Add User Type dialog box

Enter a User Type of up to 50 characters.

Click the Save and Add Another button to add another User Type, click the Add button to save the User Type and return to the Primary Lists page, or click the Cancel button to return to the previous page without saving any changes.

User Types are modified using the inline editing feature. Only user types that were not preloaded by the system can be modified. If the user type can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Reviewing Users

From the Main Menu, select Admin -> Users.

The User Management page is displayed.

To see users of specific languages, select one or more languages from the drop-down list of the Language filter.

To see users of certain roles, select one or more roles from the drop-down list of the Roles filter.

To see only active or inactive users, select one of the statuses from the Activated filter.

Use one or more of the filters to determine which of the users will be displayed. Leaving the filter blank will show all users.

Enter a user name or partial user name in the **User Name** filter.

Enter a name or a partial name of a user in the **First Name** filter.

Enter a name or a partial name of a user in the **Last Name** filter.

Enter an external ID or part of an external ID in the **External ID** filter.

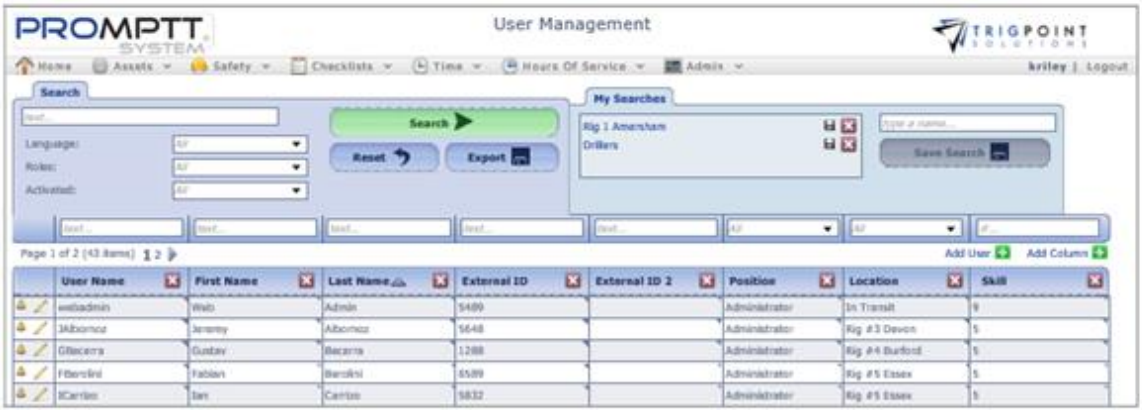
Enter an external ID 2 or part of an external ID 2 in the **External ID 2** filter.

Select one or more positions from the drop-down list of the **Position** filter.

Select one or more locations from the **Location** filter drop-down list.

Select one or more skills from the **Skill** filter drop-down list.

Click the Search button to display the results of the search.



User Management page

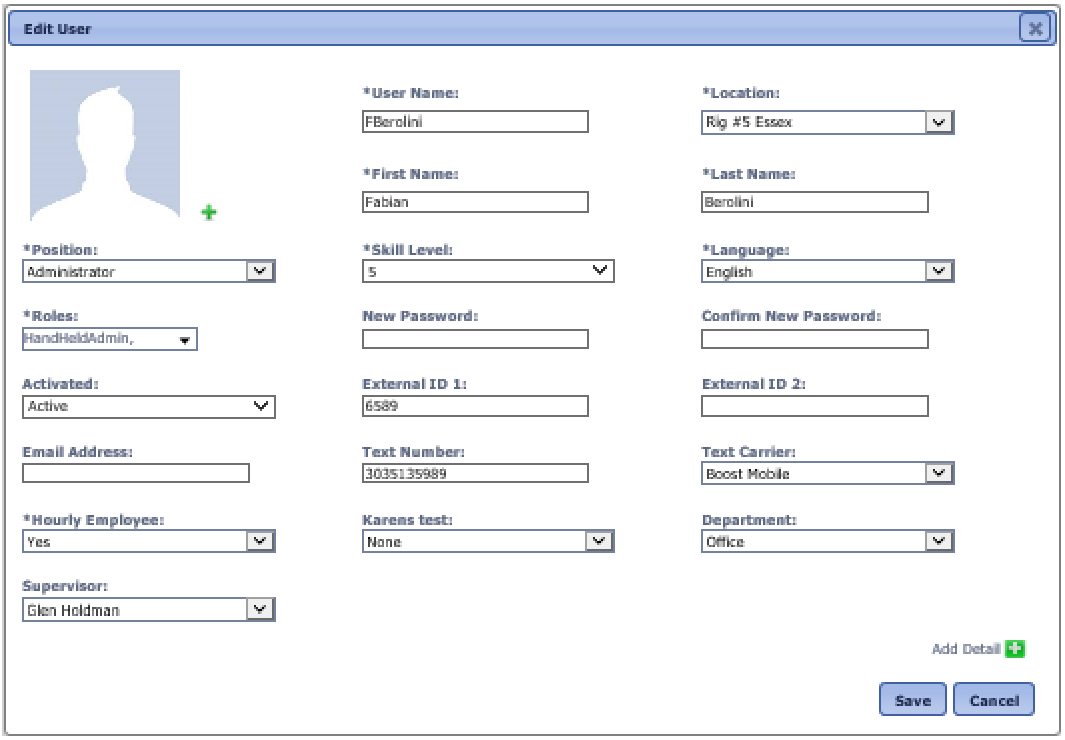
The [Search Pages] section contains additional information about search pages.

Click the bell icon to see any notifications about the user.

Creating and Modifying a User

After performing a user search, click the Pencil icon next to the user name.

The Edit User dialog box is displayed.



Edit User dialog box

To add a user, click the Add icon for Add User.

The Add User dialog box is displayed.

Enter or modify the user information.

User Name The user name is used to log in to the PROMPTT® System website and is not case-sensitive. Enter up to 50 characters.

Location The location identifies the usual work location of the user. Select a location from the drop-down list.

First Name The first name of the user. Enter up to 50 characters.

Last Name The last name of the user. Enter up to 50 characters.

Position The [position](#) is used to group users together and can be used to assign tasks. Select a position for the drop-down list.

Skill Level The skill level is used to determine the tasks for which the user is qualified. The higher the skill level the more qualified the user. Select a skill level from the drop-down list.

Language The language determines in which language the data is displayed. Select a language from the drop-down list.

Roles Roles are used to setup security configuration for similar users. A user's role is part of the determination of the user's access to the system. For example, the Handheld

User role can log onto and use the Handheld but would not have access to the Admin menu on the Handheld or be able to log in to the website. Users can be assigned to one or more roles but must always be assigned a minimum of one role beyond the *Everyone role that all users are assigned to. Please see the Security section for additional information on roles and security. Roles are also used to subscribe to configured subscription notifications.

Password The password is used to log in the PROMPTT® System website and is case sensitive.

Confirm Password The confirm password must match the content of the Password field when changing the password.

Activated Indicates whether the user is active or inactive. Select one from the drop-down list.

External ID 1 External IDs are used to track any additional IDs that the user may have from outside of the PROMPTT® System. Enter up to 50 characters.

External ID 2 External IDs are used to track any additional IDs that the user may have from outside of the PROMPTT® System. Enter up to 50 characters.

Email Address The email address of the user. Used by subscriptions.

Text Number The phone number to which to send texts. Used by subscriptions.

Text Carrier The phone carrier of the user. Select a text carrier from the drop-down list. Used by subscriptions.

Supervisor The first and last name of the user's supervisor. Select a supervisor from the drop-down list.

The mandatory fields are denoted with an asterisk (*) and require information to be entered in order to create the User.

Click the Save button to save the new user or the changes made to an existing user, or click Cancel to return to the User Management page without saving the changes.

Creating and Modifying User Details

After performing a user search, click the Pencil icon next to the user name that is to be modified.

The Edit User dialog box is displayed.

Click on the Add Detail icon.

The Add Detail dialog box is displayed.

Add Detail dialog box

Select a detail from the drop-down list. Click the Add button to add the detail to the user and return to the Edit User dialog box, or click the Cancel button to return to the Edit User dialog box without making any changes. As each detail is added to the user, it is removed from the drop-down list.

Once the detail is added to the user, a value can be entered for it from the Edit User dialog box.

Modifying a User with Inline Editing

The user can be modified using inline editing.

From the Main Menu, select Admin -> Users.

The User Management page appears.

Use one or more of the filters to limit the number of users that will be displayed; leaving the filter blank will show all users.

To use inline editing, click on the data cell that is to be changed, enter the new numeric value and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add or modify details for the users, add the columns to the User Management page, and use inline editing to enter the values. Only details that have the Edit flag set to “Yes” can be modified. Please see Search Pages for additional information about adding columns to pages.

Locations

Locations are physical or logical sites used within the company. Locations can have unlimited amounts of flexible details against them. Locations are created easily and consistently with the use of templates.

Reviewing Locations

From the Main Menu, select Admin -> Locations.

The Location Search page appears.

Use one or more of the filters to determine which of the locations will be displayed. Leaving the filter blank will show all locations.

Enter a name or a partial name of a location in the **Name** filter.

Enter a name or partial description of a location in the **Description** filter.

Select one or more location types from the **Type** filter drop-down list.

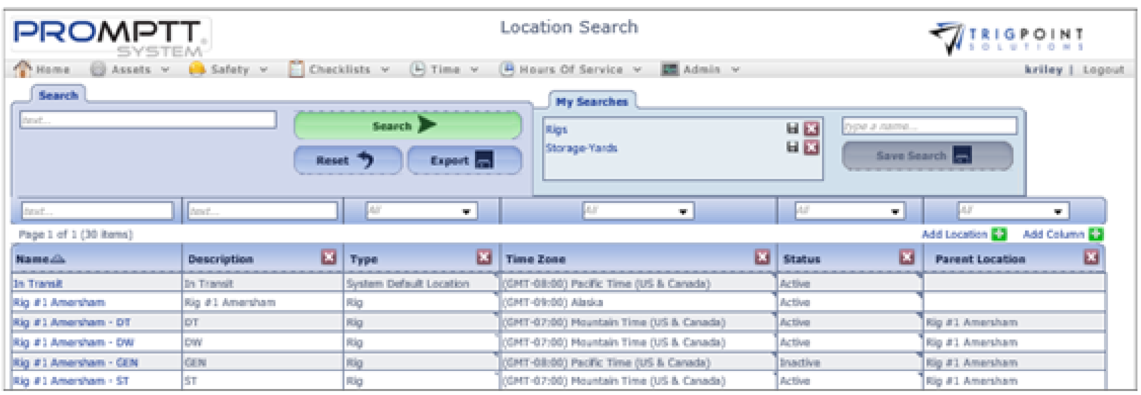
Select one or more time zones from the **Time Zone** filter drop-down list.

Select one or more statuses from the **Status** filter drop-down list.

Select one or more locations from the **Parent Location** filter drop-down list.

Click the Search button.

The results of the search are displayed.



Location Search page

The Search Pages section contains additional information about search pages.

Reviewing Location Details

Clicking a location name in the Location Search page will display the Location Details page for the location. The Location Details page consists of a header section and four tabs. The four tabs are Details, Transfer History, Work Orders, and Inventory.

- The Header section of the Location Details page has the Standard Details, the Location Hierarchy, and the Notes for the location. The **Standard Details** provides the name, type, parent name, status, and time zone of the location. The **Location Hierarchy** shows a tree of the location's relationship to other locations. The **Notes** show any notes that have been attached to the location and allows entry of new notes.

- The **Details** tab displays the location details, date last updated, and who did the update. If the detail is set to allow editing, the value can be changed using the inline editing feature.

- The **Transfer History** tab shows the transfer history of the location. This includes the material transfer ID, the location the components and items were transferred from, the location the components and items were transferred to, the type of transfer, the shipping reference, number of the transfer, the Attention To of the transfer, who made the transfer, and what date the transfer took place.

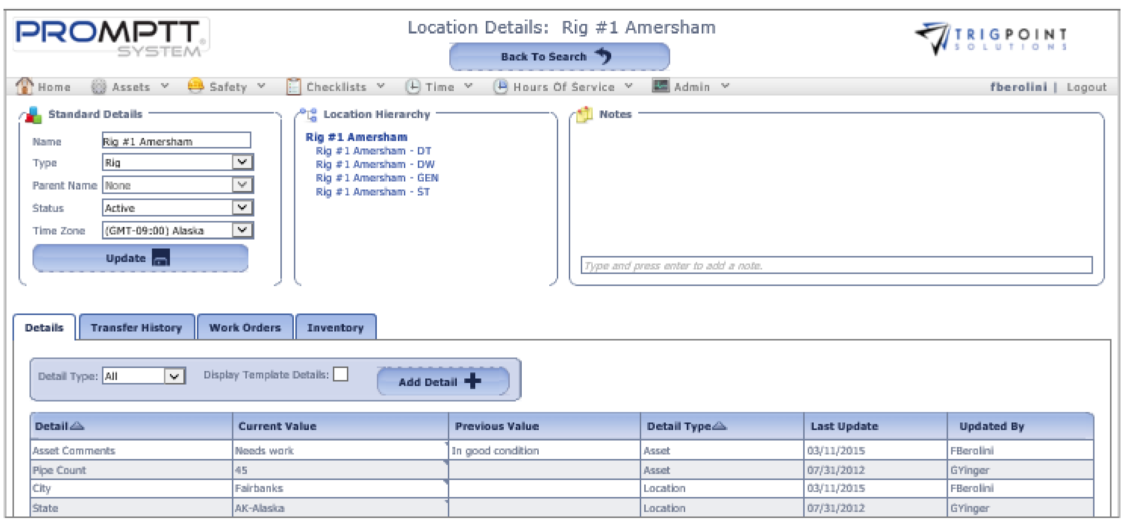
- The **Work Orders** tab presents a list of work orders for the location. It shows the ID, description, department, due date, priority, and status of the Work Order.

- The **Inventory** tab displays quantities of an item at the location. The location quantities can be added or modified in this tab.

Modifying the Standard Details

After performing a location search, click on the name of the location that is to be modified.

The Location Details page is displayed.



Location Details page

In the upper left corner is the Standard Details pane. From here, enter a new name or select a new value for the other fields from the drop-down lists. Click the Update button to save the changes.

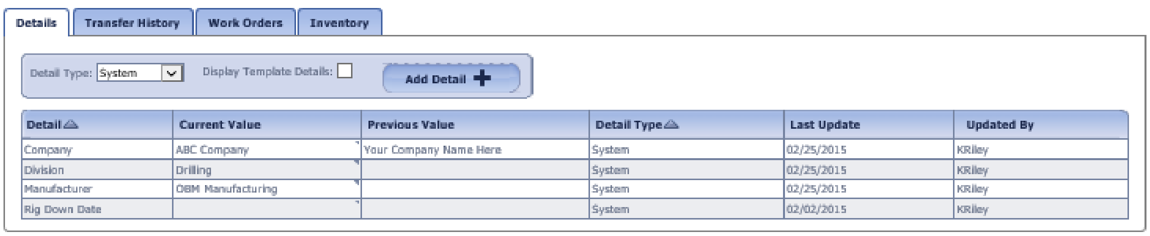
A location with a parent location is called a sub location. A parent location cannot have a parent location, but may have multiple sub locations. This relationship is shown in the Location Hierarchy pane.

To enter a note, click on the note and enter the text, pressing the Enter key will save the note.

Creating and Modifying the Details

After performing a location search, click on the name of the location that is to be modified.

The Location Details page is displayed with the details associated with the location are shown in the Details tab, sorted by Detail Type and then by Detail.



Location Details tab

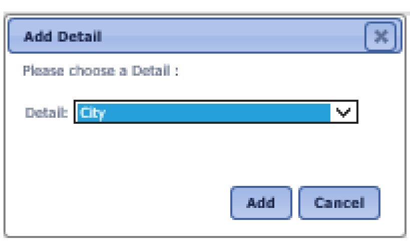
To limit the details to a specific type click on the Detail Type filter and select a detail type. To only show template details, check the Display Template Details box.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Only details that have the editable flag set to "Yes" can be modified. Details that have this flag set to "Yes" have a small triangle in the upper right-hand corner of the data cell in the current value column. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add a detail click the Add Detail button

The Add detail dialog box is displayed.



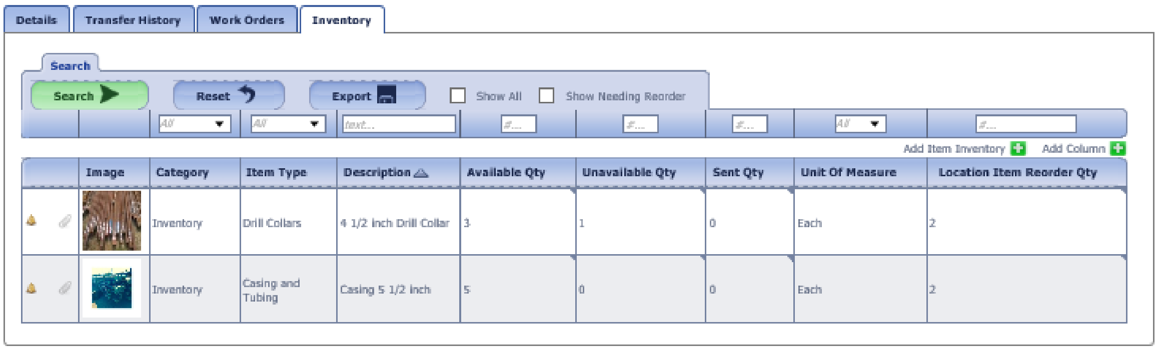
Add Detail dialog box

Select a detail from the drop-down list, click the Add button to save the detail and return to the Details tab, or click the Cancel button to return to the Details tab without saving.

Reviewing Inventory by Location

After performing a location search, click the Inventory tab on the details page.

A list of any items with inventory quantities at the location is displayed. Any items that were created with the Always Display flag turned on will also be displayed, regardless of its inventory quantities.



Location Inventory tab

The filters can be used to limit the number of items displayed: Category, Item Type, Description, Available Quantity, Unavailable Qty, Sent Qty, Unit of Measure, or Location Item Reorder Qty. Clicking the Show All Item checkbox will show all items associated with the location and any item with the Always Display detail set to Yes. Then click the Search button.

The Available Quantity, Unavailble Quantity, Sent Qty, and Location Item Reorder Qty may be modified using inline editing. Click the data cell, enter a numeric value for the data and press the Tab or Enter key to save the change. Clicking on another data cell will cancel the changes.

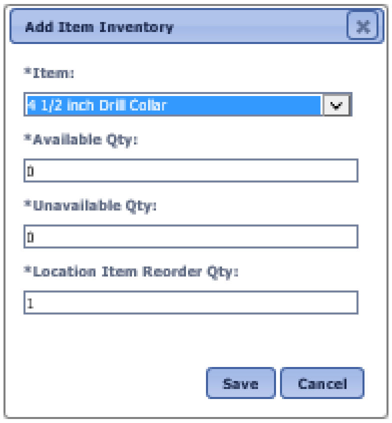
Adding Item Inventory

If an item has never had inventory at a location, it is necessary to add the item inventory to the location.

Click the Inventory tab on the details page.

From the Inventory tab, click the Add icon for Add Item Inventory.

The Add Item Inventory dialog box is displayed



Add Item Inventory dialog box

Enter the following information.

Item A drop-down list of items that have never had inventory at this location.

Available Quantity The quantity that is available at this location. Enter a numeric value with up to 2 decimals.

Unavailable Quantity The quantity that is unavailable at this location. Enter a numeric value with up to 2 decimals.

Location Item Reorder Quantity The quantity point at which the item should be re-ordered for the location. This will default to the amount set in the Item Reorder Quantity in the Item Master. Enter a whole number.

Click the Save button to save the changes and return to the Location Details page or click the Cancel button without saving the changes and return to the Locations Detail page.

Creating a Location

Locations are created with the use of location templates. The template is selected for the type of location to be created and the details are then displayed for entry. Any blind detail defaults are added behind the scenes and any other default values are pre-entered on the screen. The details are displayed on the screen in the order specified in the selected template. The mandatory fields are denoted with an asterisk (*) and require information to be entered in order to create the location.

From the Main Menu, select Admin -> Locations.

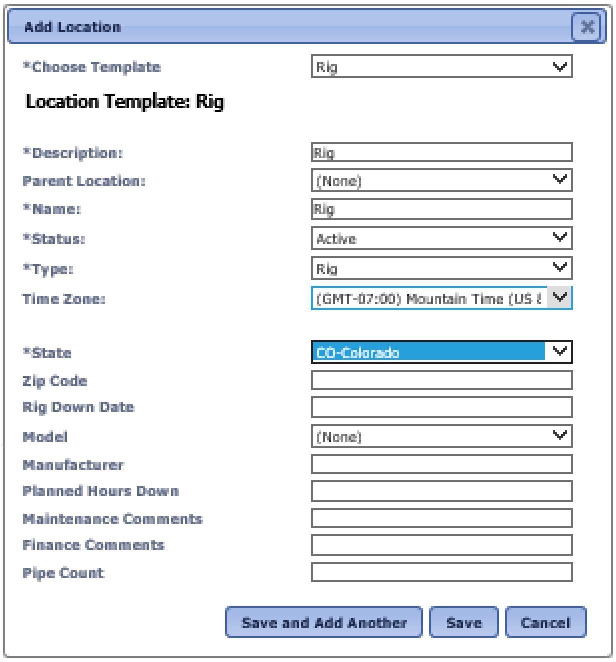
The Location Search page appears.

To add a new Location, click the Add icon for Add Location.

The Add Location dialog box is displayed.

In the Add Location dialog, select a template from the Choose Template drop-down list.

The full dialog box will be displayed after a template is selected. All of the required fields will default to the values setup in the template. Any detail definitions associated with the template that have the prompt flag set to "Yes", will also be displayed.



Add Location dialog box

Fields are specific, according to the template selected.

Enter or change any of the fields as needed to create the location.

Description A detailed description for the location. This will default to the value setup in the template.

Parent Location A drop-down list of locations. If the location is a sub location of another location, enter that location here. This will default to the value setup in the template.

Name The name of the location. This will default to the value setup in the template.

Status A drop-down list of location statuses. This will default to the value setup in the template.

Type A drop-down list of the location types. This will default to the value setup in the template.

Time Zone A drop-down list of the time zones. This will default to the value setup in the template.

Detail Definition Fields Any detail definitions that have the prompt flag set to “Yes” in the location template will be available for modification. These will default to the value set up in the location template when setup. If the detail definition has the mandatory flag set to “Yes”, the fields will be required. Any additional details can be added to the location after it is created.

Click the Save and Add Another button to add another location, click the Save button to save the changes and return to the Location Search page, or click the Cancel button to return to the previous page without saving the changes.

Device Activity

The system records each time a device starts a sync and successfully syncs to the PROMPTT® System. This information can be viewed in the Device Activity page.

Reviewing Device Activity

From the Main Menu, select Admin -> Device Activity.

The Device Activity page is displayed.

To see device activity for a specific time, click the radio button in front of Less Than 24 hours, 25-72 Hours, 73-168 Hours, or More Than One week. The default is All.

Use one or more of the filters to determine which of the devices will be displayed. Leaving the filter blank will show all devices.

Enter a numeric value in the **ID** filter.

Enter a device ID or a partial ID in the **Device ID** filter.

Select one or more device types from the **Device Type** filter drop-down list.

Select one or more publication levels from the **Pub Level** filter drop-down list.

Select one or more locations from the **Location** filter drop-down list.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Last Sync Start** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Last Successful Sync** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

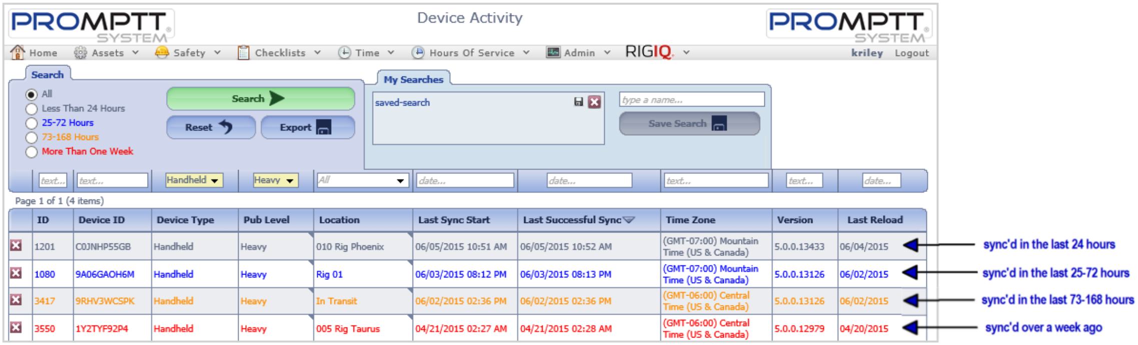
Enter a time zone or a partial time zone in the **Time Zone** filter.

Enter a version or a partial version in the **Version** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the Last Successful Sync filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed with the different sync times color coded for ease of reading. Devices that have synchronized in the last 24 hours are in grey text, devices that have synchronized in the last 25-72 hours in dark blue text, devices that have synchronized in the last are in ochre text, and devices that have not synchronized in over a week are in red text.



Device Activity page

The Search Pages section contains additional information about search pages.

Click the Delete icon to delete an activity from the page.

Changing Publication Levels

To change the publication level on a device, use the inline editing feature on the Pub Level data cell. Select Heavy, Standard, or Lite from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change. It is then necessary to synchronize the device to pick up the new publication level.

Device Registration

The first time a device is synchronized with the system, it records the details of the device. This information can be viewed in the Device Registration page.

Reviewing Device Registration

From the Main Menu, select Admin -> Device Registration

The Device Registration page is displayed.

Use one or more of the filters to determine which of the devices will be displayed. Leaving the filter blank will show all devices.

Enter a device ID or a partial ID in the **Device ID** filter.

Enter a device name or a partial device name in the **Name** filter.

Enter a user name or a partial user name in the **User Name** filter.

Select Yes, No, or All from the **Shared** filter.

Enter an operating system version or a partial operating system version in the **OS Version** filter.

Enter an equipment manufacturer or a partial equipment manufacturer in the **OEM** filter.

Enter a model or a partial model in the **Model** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Registered On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The Device Registration page is displayed.

Device Registration page

The Search Pages section contains additional information about search pages.

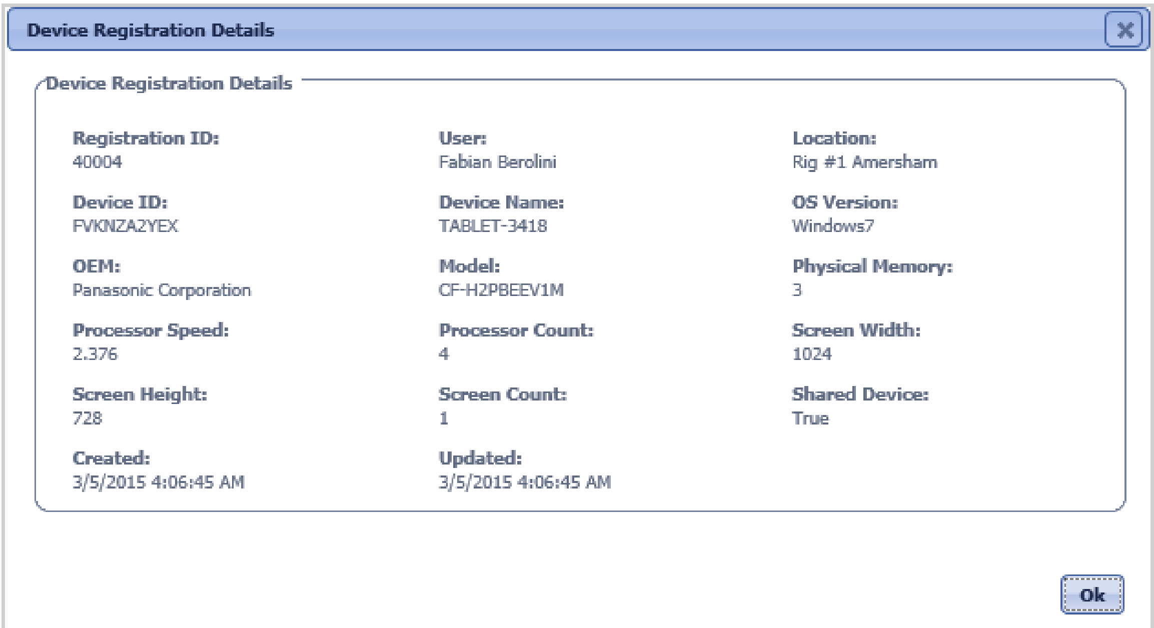
Reviewing the Device Registration Details

From the Main Menu, select Admin -> Device Registration

The Device Registration page is displayed.

Click the Pencil icon to the left of the device that is to be viewed.

The Device Registrations Details dialog box is displayed.



Device Registration Details dialog box

Click the OK button to return to the Device Registration page.

Attachments

Every time an attachment is linked to an object in the system, it is saved in the system. These attachments can be accessed and viewed in the Attachments page.

Reviewing Attachments

From the Main Menu, select Admin -> Attachments

The Attachments page is displayed.

Use one or more of the filters to determine which of the attachments will be displayed. Leaving the filter blank will show all attachments.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter an attachment name or a partial attachment name in the **Name** filter.

Select one or more attachment type from the **Type** filter drop-down list.

Select one or more objects to which the attachment is assigned from the **Assigned To** filter drop-down list.

Enter a file name or a partial file name in the **File Name** filter.

Enter a numeric value in the **Size** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

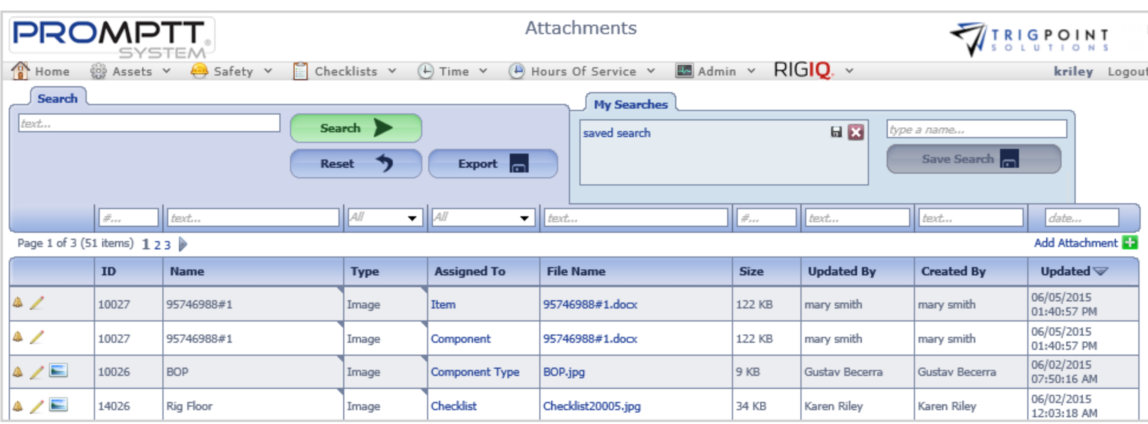
Enter a user name or partial user name in the **Update By** filter.

Enter a user name or partial user name in the **Created By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The Attachments page is displayed.



Attachments page

Click the Filename to open the file, click Assign To link to open to the object to which the attachment is linked.

Click the Bell icon to any notifications regarding the attachment.

Click the Pencil icon to view the details of the attachment.

Click the image icon to view the attachment.

The Search Pages section contains additional information about search pages.

Adding an Attachment

Click the Add icon

The Add Attachment dialog box is displayed.

Add Attachment dialog box

Click the Browse button to select the file to attach.

Enter the Name and select the type of attachment.

Click the Upload button. Click the Browse button to add another attachment, or click the Close button to return to the Attachments page.

Reviewing the Attachment Details

From the Main Menu, select Admin -> Attachments

The Attachments page is displayed.

Click the Pencil icon to the left of the attachment that is to be viewed.

The Attachment dialog box is displayed.

Attachment dialog box

Click the Close button to return to the Attachments page.

Subscriptions

The PROMPTT® System has the ability to send emails and texts to users when specific notifications are created through subscriptions. Subscriptions also determine which notifications will be displayed to the user in the Subscriptions content brick on the home page. Subscriptions are setup by roles.

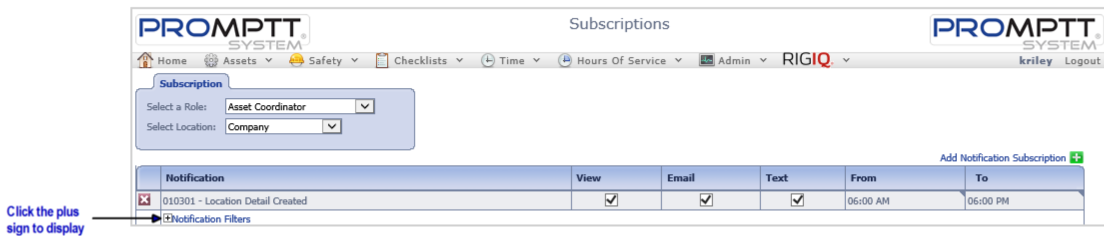
Reviewing a Subscription

From the Main Menu, select Admin -> Subscriptions

The Subscriptions page is displayed.

Select the role for which the subscription will viewed.

Subscription that have been previously setup will default the location and any notifications setup as subscriptions will be displayed.



Subscriptions page

Creating a Subscription

From the Main Menu, select Admin -> Subscriptions

The Subscriptions page is displayed.

Select the role for which the subscription is to be added from the Select a Role drop-down list.

Select a location from the drop-down list. The system will have default locations of My Location, Company, Region. Additional locations can be added through the supplemental list "Location Display Details".

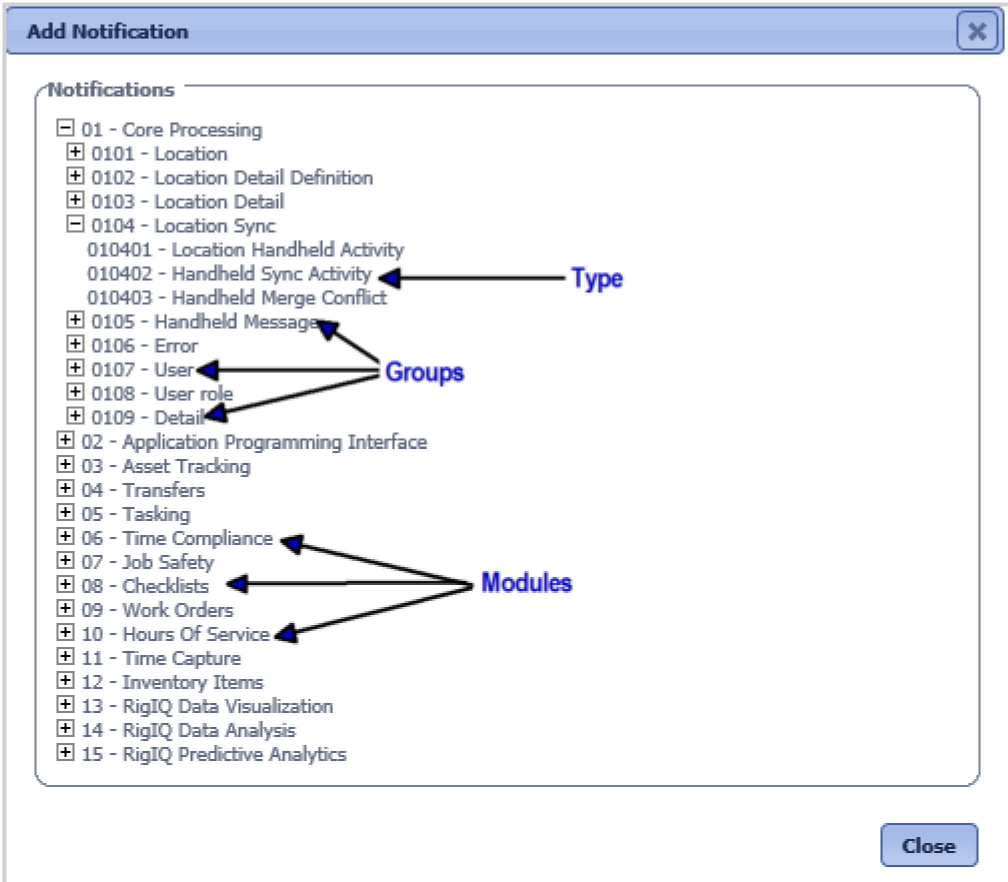
Click the Add icon for Notification Subscription.

The Add Notification dialog box is displayed.

To add all notifications for a module click the module name.

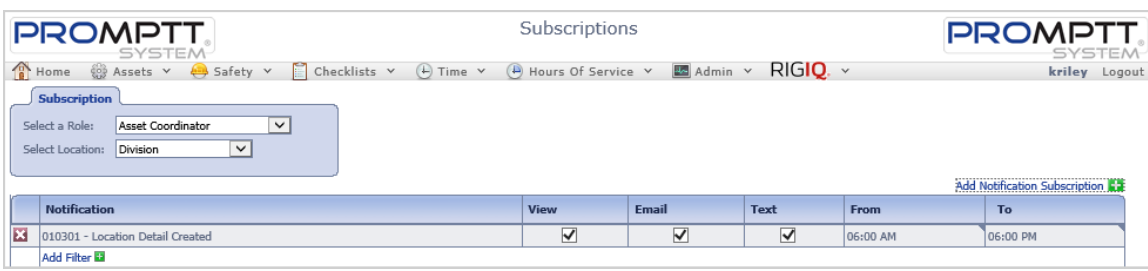
To add a group of notifications for the module, click the plus sign to expand the selection and click on a group. All the notification types under the group will be added to the subscription.

To add a type of notification click the plus sign for the group to expand the selection and click on a notification.



Add Notifications dialog box with expanded modules and groups

The notification will be added to the subscription.



Subscriptions

To see the notification in the Subscriptions content brick on the Home page, have the View checked. The user must have the Subscriptions content brick added to their home page to see the notification.
To have an email sent to users that have the role, have the Email box checked. The users must have an email entered in their user profile in order to have an email sent to them.

To send a text to users that have the role, have the text box checked. The users must have a cell phone number entered in their user profile in order to have a text sent to them.

To limit when text and emails are sent out, enter a From and To time. The default is 4:00 am to 4:00 pm. Click on the hour, use the up and down arrows on the keyboard to change the hours, or type in the hours. Use the right arrow to move to the minutes, use the up and down arrows to change the minutes, or type in the minutes. Use the right arrow to move to the period, use the up and down arrows to select a period, and use the Enter key to save the entry. Clicking in another cell without using the Enter key will cancel the entry.

To delete a notification from the subscription click the Delete icon to the left of the subscription.

To add a filter to the subscription click the Add icon for Filter after adding the notification. Only notifications that match the criteria entered in the filter will be sent to the users. If the same filter is setup for the two different roles, and a user has both roles, the filter will only be sent out once.

The Filter pane is expanded.

Filter pane

Select the element that the notification is to be filter upon from the Filter drop-down list. The elements that can be used as a filter are setup in the supplemental lists of type subscription filter.

Select an operator from the Operator drop-down list.

Enter value for the filter in the Text field. Keywords can be used here.

To add another filter, click the Add icon for Filter. A notification must match all the filters in order for it to be viewed or sent.

To delete a filter click the Delete icon to the left of the filter.

Example A

Role=Rig Manger

Location= My Location

Notification = 030402 - Component Detail Updated

View = Checked. Email = Unchecked. Text = Checked.

Filter	Operator	Text
ComponentName	Like	Agitator
DetailName	=	Oil Pressure
NewValue	>	150

Oil Pressure is a component detail. Every time the Oil Pressure on a component that has the word Agitator in it is updated to a value over 150 and the component is at the Rig Manager's location, it will be shown in the Subscriptions content brick on any users who have a role of Rig Manager. A text will be sent out to the same users who have a phone number setup in their user profiles.

Example B

Role=Asset Manger

Location= My Location

Notification = 030402 - Component Detail Updated

View = Checked. Email = Checked. Text = Unchecked.

Filter	Operator	Text
ComponentType	=	Engine
DetailName	=	Oil Level
NewValue	=	Low
OldValue	=	OK

Oil Level is a component detail. Every time the Oil Level on a component that is type of Engine is updated to the value Bad from a value of OK, and the component is at the Asset Manager's location, it will be shown in the Subscriptions content brick on any users who have a role of Asset Manager. An Email will be sent out to the same users who have an email setup in their user profile.

Primary Lists

Primary lists are a collection of twenty pre-loaded system lists that users can view, add, or modify. The use of primary lists makes data entry easy and aids in keeping the data consistent. Primary Lists are used throughout the system and are further explained in the corresponding sections.

Component Data Type Component Data Types are used to determine the type of data a component detail definition can store. They come preloaded in the system and the user can only view them.

Component Detail Type Component Detail Types are used to sort and select component details in reports.

Component Status Component Statuses are used to identify the different states that a component can pass through as they are used.

Component Type Component Types are used to sort and select components in reports.

Instruction Group Type Instruction Group Types are used to sort and select the groups in task assignment.

Instruction Type The instruction types are used to determine which instructions a task profile will use when generating the task list. The system comes preloaded with an instruction type of *No Instructions and the user can add any additional instruction types required. Instruction Types are maintained in the primary lists.

Location Data Type Location Data Types are used to determine the type of data a location detail definition can store. They come preloaded in the system and the user can only view them.

Location Detail Type Location Detail Types are used to sort and select location details in reports.

Location Status Location Statuses are used to identify the different states of a location.

Location Type Location Types are used to sort and select location in reports.

Maintenance Plan Types Maintenance Plan Types are used for grouping and reporting the different task assignments.

Material Transfer Type Material Transfer Types are used to define the different types of transfers that the PROMPTT® System supports. The Material Transfer Type determines if a transfer is a ship or receive, are maintained in the primary lists and the user can then add any additional roles that are required.

Message Type Message types are used to define the different type of messages that the system uses. They come preloaded in the system and the user can only view them.

Notification Type Notification types are used to define the different type of notifications that the system creates. They come preloaded in the system and the user can only view them.

Reject Code The reasons to reject a task list, component, or individual task or the reason why a component scan was skipped during tasking.

Reject Code Types Used to group reject codes together by type for grouping and reporting purposes.

Response Type Response Types are using to define the type of answer or action that will be required when an instruction is completed in a task. The system comes with preloaded response types and the user can view them in the primary lists.

Role Roles are used to determine user access to the system when configuring security and are used to subscribe to configured subscription notifications. The system comes with basic roles and their corresponding security preloaded.

Ship Via The Ship Via is used to maintain a consistent list of shipping vendors.

Task Profile Type Task Profile Type determines how the task profile is to be run. The system comes with preloaded with the response types and the user can view them in the primary lists.

User Type User Types are used to sort and select user in reports.

Supplemental Lists

Supplemental lists are user-defined lists that can be used throughout the system as well as pre-determined system defined lists. The use of supplemental lists makes data entry easy and aids in keeping the data consistent.

Reviewing Supplemental Lists

From the Main Menu, select Admin -> Supplemental Lists

The Supplemental Lists page is displayed.

Use one or more of the filters to determine which of the lists will be displayed. Leaving the filter blank will show all supplemental lists.

Enter a name or a partial name of a supplemental list in the **Name** filter.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select Yes, No, or All from the **Active** filter.

Select Yes, No, or All from the **System Data** filter.

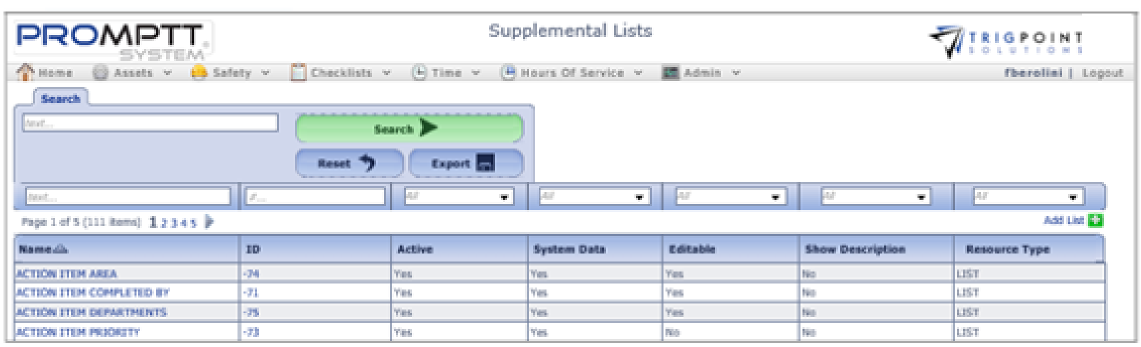
Select Yes, No, or All from the **Editable** filter.

Select Yes, No, or All from the **Show Description** filter.

Select one or more resource types from the Resource Type filter drop-down list.

Click the Search button

The search results are displayed.



Supplemental Lists page

The Search Pages section contains additional information about search pages.

Creating and Modifying a Supplemental List

To add a new supplemental list, click Add icon for Add List.

The Add List dialog box is displayed.

To edit a supplemental list, perform a search and click on the Name or blue ID number of the list.

Enter or modify the following information

Name Enter the name of the list, as it will appear in the system. Enter a name of up to 50 characters.

Active Select Yes or No from the drop-down list.

System Data Select a No from the drop-down list. Lists that have this value set to "Yes" were shipped with the base system. User-defined lists should have a value of "No".

Editable For lists that have the System Data set to a Yes and editable set to a No, the list cannot be edited. Some System list can have editable list items. Select Yes or No from the drop-down list.

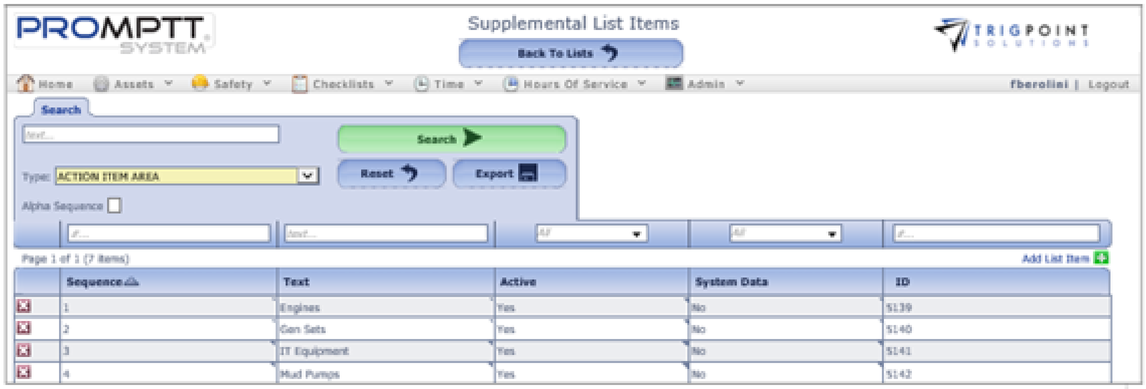
Show Description This allows a description to be entered when entering elements for the list. Select Yes or No from the drop-down list.

Resource Type Used to group lists and translations together. Select the type of resource from the drop-down list where this supplemental list will be used.

Click the Add button to save the changes and return to the Supplemental Lists page or click the Cancel button without saving the changes and return to the Supplemental Lists page.

To view the elements of the supplemental list, click on the Name or ID of the list that is to be modified.

The Supplemental List Items page is displayed.



Supplemental List Items page

Use one or more of the filters to determine which of the elements of the supplemental list will be displayed. Leaving the filter blank will show all lists.

Enter a numeric value in the **Sequence** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a name or a partial name of a supplemental list in the **Text** filter.

Select Yes, No, or All from the **Active** filter drop-down list.

Select Yes, No, or All from the **System Data** filter drop-down list.

Enter a numeric value in the **ID** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

To add an element to a supplemental list

Click the Add icon for Add List.

The Add List Item dialog box is displayed.

Sequence The list order. Enter a numeric value with no decimals.

Text Enter the text of the element, as it will display in the system.

Description If the description was set to “Yes” when adding the supplemental list, a full description can be entered in this field.

Active Indicate if the list is active for selection purposes. Select Yes or No from the drop-down list.

System Data Select No from the drop-down list.

Click the Save and Add Another button to save the changes and add another, click the Add button to save the changes and return to the Supplemental List Items page, or click the Cancel button without saving the changes and return to the Supplemental List Items page.

To delete a supplemental list element, click the Delete icon to the left of the element. Only elements that have not been used can be deleted.

Some supplemental lists came loaded with the system and the user cannot add or change them. The following supplemental lists fall under this category.

ACTION TYPE

APPLICATION TYPE

ATTACHMENT TYPE

BATCH STATUS

CARRIERS

CATCH OF THE WEEK

CHECKLIST ANSWERED

CHECKLIST COMPONENT

CHECKLIST EXPORT TYPE

CHECKLIST GROUP TYPE

CHECKLIST QUESTION ANSWER TYPE

CHECKLIST ROLE

CHECKLIST SUB TYPE

CHOICE LIST DONE

CHOICE LIST OK

CHOICE LIST VALID-INVALID

CHOICE LIST YES-NO

COMPONENT HISTORY ENTRY TYPE

DASHBOARD FAVORITE WIDGET TYPE

DASHBOARD TYPE

DASHBOARD USAGE

DASHBOARD WIDGET TYPE

DATA FORMAT

DATA TYPE

DETAIL TYPE

DETAIL UPDATE RULE

DEVICE TYPE

EDIT GROUP

ENTITY

FILTER ITEM TYPE

FORM TYPE

HIGHEST RISK

HOURS OF SERVICE DUTY STATUS

HOURS OF SERVICE INSPECTION

ITEM CATEGORY

ITEM HISTORY ENTRY TYPE

ITEM MASTER STATUS

ITEM TYPE DEFAULT

ITEM TYPE PROMPT

JOBSAFETY CATEGORY

LOCATION DISPLAY DETAILS

MATERIAL TRANSFER TYPE

MEETING TYPE

NEXT ACTION

NOTIFICATION GROUP

OBSERVATION APPROVAL TYPE

PAGE TYPE

PAY CODE

PAY CYCLE WEEK

QUESTION TYPE

RIG INSPECTION ANSWERS

SHIFT ACTION TYPE

SHIFT APPROVAL TYPE

SHIFT BREAK TYPE

SHIFT OVERRIDE REASON CODE

SHIFT STATUS

SHIFT TYPE

SUBSCRIPTION FILTER

SYNCTOHANDHELD ATTACHMENT MIME TYPE

TIME CARD STATUS

UNITS

UPDATE RULE

UPDATE SOURCE ENTRY TYPE

UPDATE TARGET ENTRY TYPE

WEEKLY SUMMARY STATUS

WORK ORDER CREATED ON

WORK ORDER PRIORITY

WORK ORDER STATUS

WORK STATUS

Detail Definitions

The detail definitions are used to describe details that can be added to various objects such as items, users, departments, or work orders.

Reviewing a Detail Definition

From the Main Menu, select Admin -> Detail Definitions

The Detail Definitions page is displayed.

Use one or more of the filters to determine which of the detail definitions will be displayed. Leaving the filter blank will show all detail definitions.

Select one or more detail types from the **Detail Type** filter drop-down list.

Enter a name or a partial name of a detail definition in the **Name** filter.

Select Yes, No, or All from the **Always Display** filter.

Select Yes, No, or All from the **Mandatory** filter.

Select one or more data types from the **Data Type** filter drop-down list.

Select one or more list types from the **List Type** filter drop-down list.

Enter a numeric value in the **Size** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a numeric value for the precision in the **Prec** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select Yes, No, or All from the **Handheld** filter.

Click the Search button.

The search results are displayed.

Detail Definitions page

To delete a detail definition, click the Delete icon.

The Remove dialog box will be displayed.

Remove dialog box

Click the OK button to delete the detail, or click the Cancel button to return to the Detail Definitions page without deleting the detail.

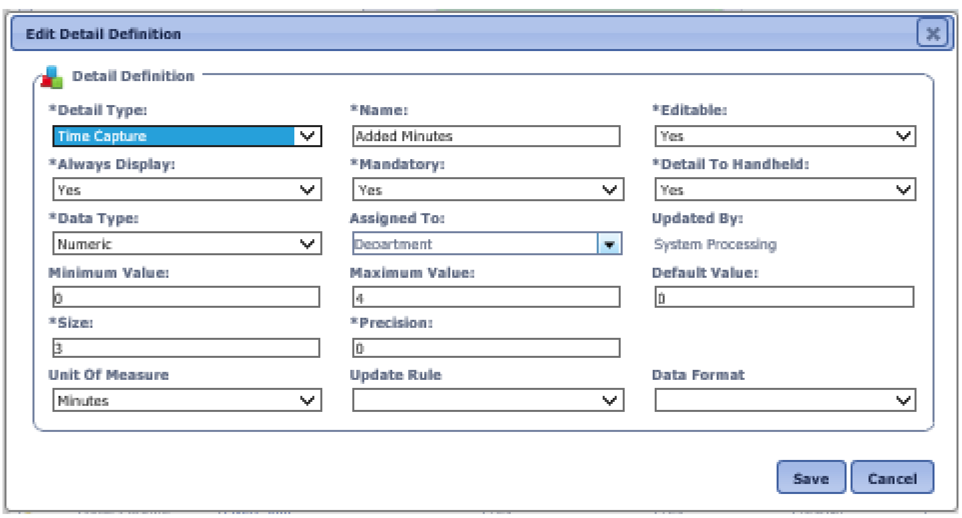
Only detail definitions that have not been used in the system can be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Detail Definition

After performing a detail definition search, click on the Pencil icon to the left of the detail definition that is to be modified.

The Edit Detail Definition dialog box is displayed.



Edit Detail Definition dialog box

To create a new Detail Definition click on the Add icon for Add Detail Definition.

The Add Detail Definition dialog box is displayed.

Enter or modify the data for the detail definition

> **Detail Type** Detail types are used for grouping and reporting purposes. Select a detail type from the drop-down list.
>
> **Name** The name of the detail. Enter a name of up to 50 characters.

Editable Determines if the detail can be modified when creating or modifying. Select Yes or No from the drop-down list.

Always Display Details that have not been added to an object will not be displayed when viewing the object. If this field is set to Yes then the detail will always display regardless of whether the detail has been added to the object. Select Yes or No from the drop-down list.

Mandatory Determines if the detail is required when creating or modifying the object that has this detail assigned to it. Select Yes or No from the drop-down list.

Detail to Handheld Determines if the detail will be displayed on the Handheld. Select Yes or No from the drop-down list. Sending details to the Handheld will send additional data to the Handheld and could increase the synchronization times for the Handheld.

Data Type Determines the type of data that the detail will hold. Select a data type from the drop-down list. The data type selected determines the fields that will be prompted.

If a date, date time, or time data type is selected, a minimum value, maximum value, default value, unit of measure or update rule may optionally be entered.

If list data type is selected, a list must be selected. A default value may be selected from the drop-down list.

If a numeric data type is selected, the size and precision must be entered. A minimum value, maximum value, default value, unit of measure, update rule, or data format may be optionally entered.

If a text data type is selected, a size must be entered. A minimum value, maximum value, default value, unit of measure, update rule, or data format may be optionally entered.

Assigned To The detail will be used with these types of objects. Select one or more of the objects from the drop-down list.

Updated By The system will automatically update this value with the user name whenever the detail is modified.

When adding a new detail definition, click the Save Add Another button to save the detail definition and add another, click the Save button to save the detail definition and return to the Detail Definitions page or click the Cancel button without saving the detail definition and return to the Detail Definitions page.

When modifying an existing detail definition, click the Save button to save the changes and return to the Detail Definitions page or click the Cancel button without saving the changes and return to the Detail Definitions page.

Setting up Components

Creating and Modifying a Component Type

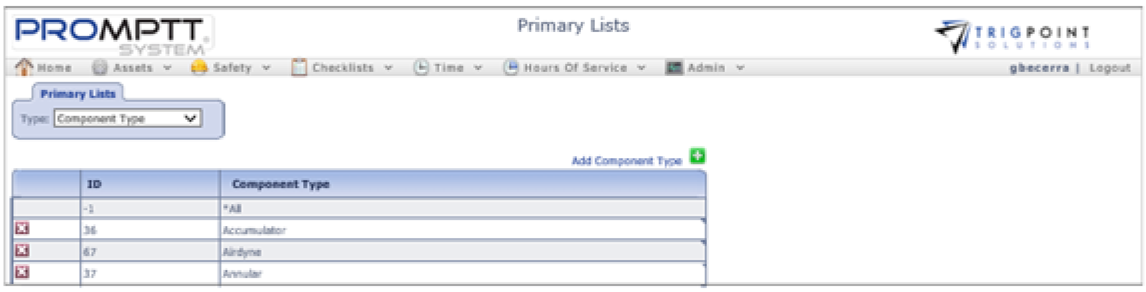
Component types are used to group and select components in the PROMPTT® System. They are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Component Type from the Type drop-down list.

A list of component types is displayed.

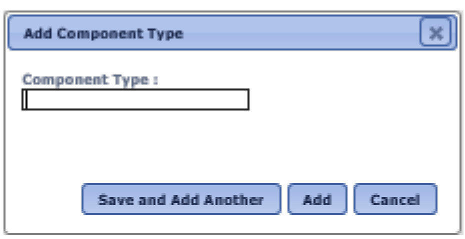


Primary List page - Component Type

The existing component types can be edited using inline editing. Click on the component type that is to be changed, enter the new text and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new component type, click the Add icon for Add Component Type.

The Add Component Type dialog box is displayed.



Add Component Type dialog box

Enter a Component Type of up to 50 characters.

Click the Save and Add Another button to save the changes and add another component type, click the Add button to save the changes and return to the Primary List page or click the Cancel button without saving the changes and return to the Primary List page.

Viewing Component Data Type

Component Data Types are used to determine the type of data a component detail definition can store. They come preloaded in the system and the user can only view them. Component Data Types can be viewed in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

Select Component Data Types in the Type drop-down list.

Primary Lists page – Component Data Type

Creating and Modifying Component Statuses

Component Statuses are used to identify the different states that a component can pass through as they used. Component Statuses are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

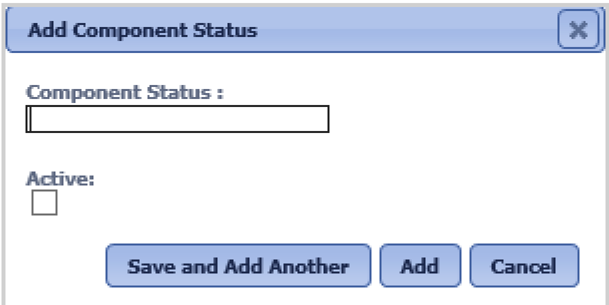
The Primary Lists page is displayed.

Select Component Status in the Type drop-down list.

Primary Lists page – Component Status

Click the Add icon for Component Status.

The Add Component Status dialog box is displayed.



Add Component Status dialog box

Enter a Component Status of up to 50 characters.

Click the Active checkbox to mark the status as active, or leave it blank to mark it as inactive.

Click the Save and Add Another button to add another Component Status, click the Add button to save the Component Status and return to the Primary Lists page, or click the Cancel button to return to the previous page without saving any changes.

Component Statuses are modified using the inline editing feature. If a field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Creating and Modifying a Component Detail Type

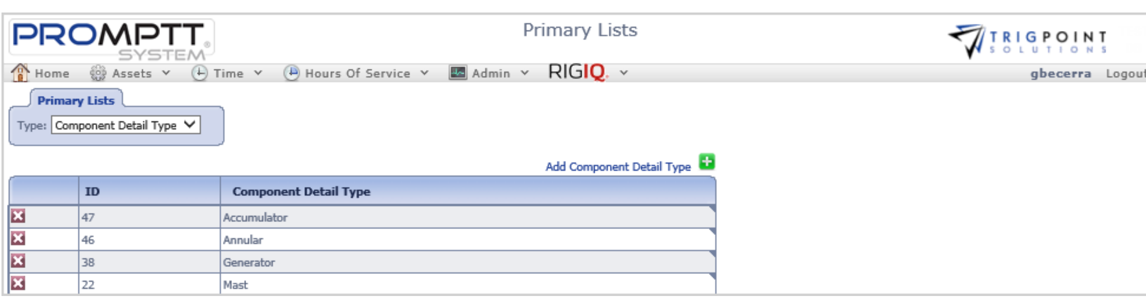
Component Detail Types are used to sort and select component details in reports.

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Component Detail Type from the drop-down list.

A list of component detail types is displayed.

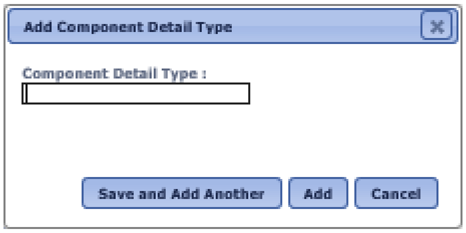


Primary Lists – Component Detail Type

The existing component detail types can be edited using inline editing. If a field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the component detail type that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new component detail type, click the Add icon for Add Component Detail Type.

The Add Component Detail Type dialog box is displayed.



Add Component Detail Type dialog box

Enter a Component Detail Type of up to 50 characters.

Click the Save and Add Another button to save the changes and add another, click the Add button to save the changes and return to the Primary List page or click the Cancel button without saving the changes and return to the Primary List page.

Component Choice List

Creating and Modifying a Component Choice List

From the Main Menu, select Admin -> Component Choices

The Component Choices page is displayed.

Select a choice list from the Type filter.

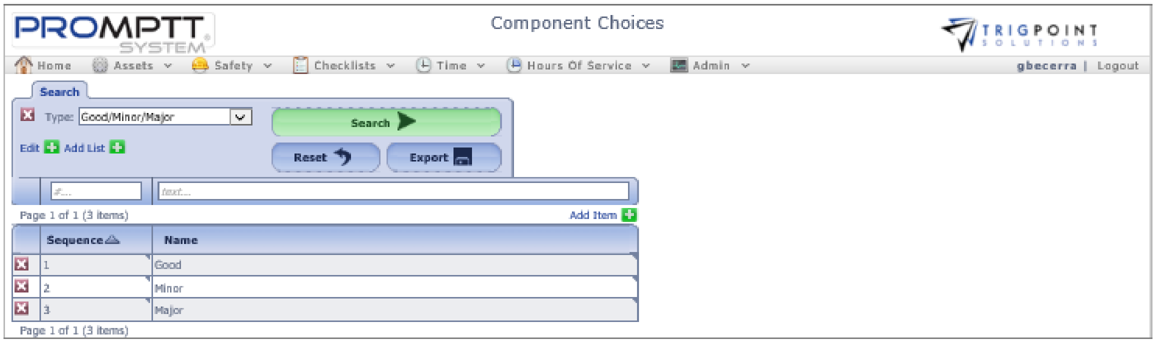
Use one or both of the filters to determine which of the choice list elements will be displayed. Leaving the filter blank will show all elements.

Enter a numeric value in the **Sequence** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a name or a partial name of a choice list in the **Name** filter.

Click the Search button

The results of the search are displayed.



Component Choices page

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

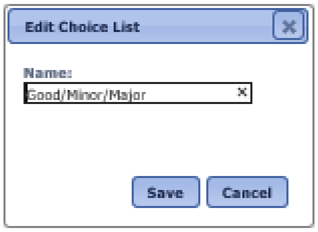
To return the page to its initial values, click the Reset button.

To export the data displayed on the page to an Excel file format, click the Export button.

To delete a choice list, click the Delete icon next to the Type field. Only choice lists that have not been used in the system may be deleted.

To modify the name of the choice list, click the Add icon for Edit.

The Edit Choice List dialog box is displayed.



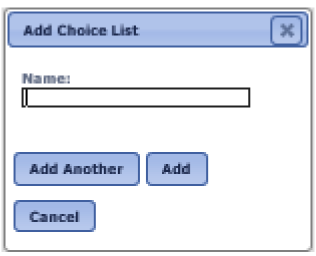
Edit Choice List dialog box

Enter up to 50 characters for the Name of the choice list.

Click the Save button to save the changes and return to the Component Choices page or click the Cancel button without saving the changes and return to the Component Choices page.

To add a new choice list click the Add icon for Add List .

The Add Choice List dialog box is displayed.



Add Choice List dialog box

Enter up to 50 characters for the Name of the choice list.

Click the Save and Add Another button to save the changes and add another, click the Add button to save the changes and return to the Primary List page, or click the Cancel button without saving the changes and return to the Primary List page.

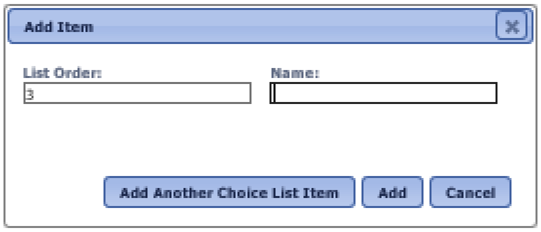
To modify the elements of an existing choice list, select the choice list from the Type drop-down list.

The existing component choice lists elements can be edited using inline editing. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list, and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add an element to a choice list, select the choice list from the Type drop-down list.

Click the Add icon for Add Item.

The Add Item dialog box is displayed.



Add Item dialog box

Enter a single digit numeric value for the list order.

Enter up to 50 characters for the name of the element.

Click the Add Another Choice List Item button to save the changes and add another, click the Add button to save the changes and return to the Component Choices page or click the Cancel button without saving the changes and return to the Component Choices page.

To delete a choice list element, click the Delete icon to the left of the element. Only elements that have not been used in the system may be deleted.

Component Detail Definitions

Reviewing a Component Detail Definition

From the Main Menu, select Admin -> Component Detail Definitions

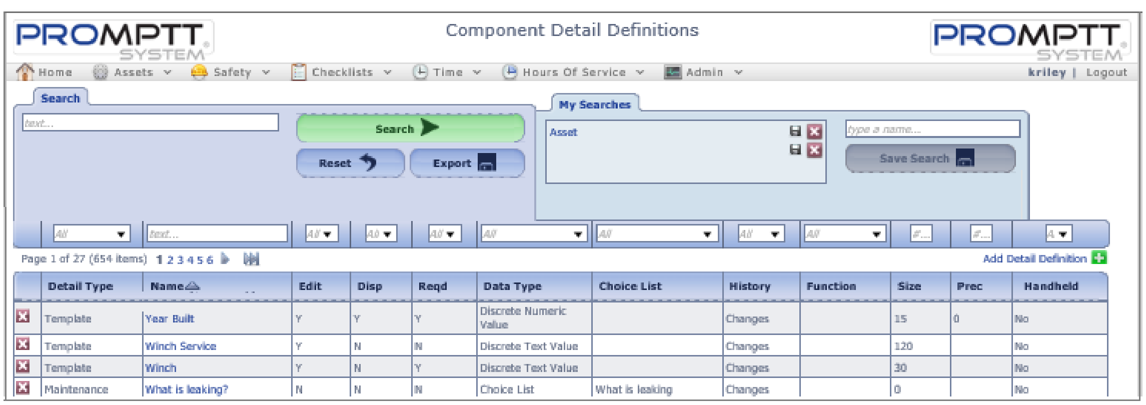
The Component Detail Definitions page is displayed.

Use one or more of the filters to determine which of the detail definitions will be displayed. Leaving the filter blank will show all detail definitions.

> Select one or more detail types from the **Detail Type** filter drop-down list.
>
> Enter a name or a partial name of a detail definition in the **Name** filter.
>
> Select Y, N, or All from the **Edit** filter.
>
> Select Y, N, or All from the **Disp** filter.
>
> Select Y, N, or All from the **Reqd** filter.
>
> Select one or more data types from the **Data Type** filter drop-down list.
>
> Select one or more choice lists from the **Choice List** filter drop-down list.
>
> Select All, None, Always, or Changes from the **History** filter drop-down list.
>
> Select one or more functions from the **Function** filter drop-down list.
>
> Enter a numeric value in the **Size** filter. The less than, greater than or equals symbol can be used immediately preceding the value.
>
> Enter a numeric value in the **Prec** filter. The less than, greater than or equals symbol can be used immediately preceding the value.
>
> Select Y, N, or All from the **Handheld** filter.

Click the Search button to display the results of the search.

The search results are displayed.



Component Detail Definitions page

The Search Pages section contains additional information about search pages.

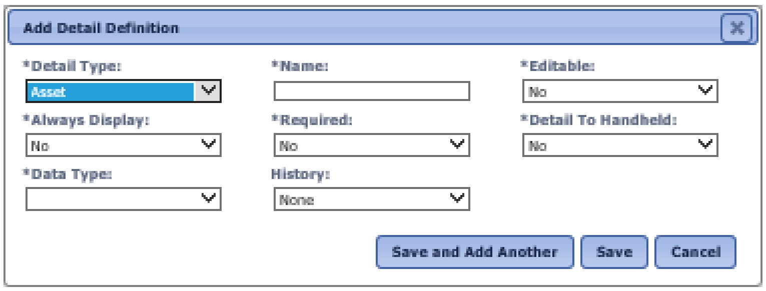
Creating and Modifying a Component Detail Definition

After performing a component detail definitions search, click on the name of the detail definitions that is to be modified.

The Edit Detail Definition dialog box is displayed.

To Create a new Detail Definition, click on the Add icon for Add Detail Definition.

The Add Detail Definition dialog box is displayed.



Detail Definition dialog box

Enter or modify the data for the detail definition

Detail Type Detail types are used for grouping and reporting purposes. Select a detail type from the drop-down list.

Name The name of the detail. Enter up to 50 characters for the name.

Editable Determines if the detail can be modified when creating or modifying. Select Yes or No from the drop-down list.

Always Display Details that have not been added to a component will not be displayed when viewing the object. If this field is set to “Yes” then the detail will always display regardless of whether the detail has been added to the component. Select Yes or No from the drop-down list.

Required Determines if the detail is required when creating or modifying the component that has this detail assigned to it. Select Yes or No from the drop-down list.

Detail to Handheld Determines if the detail will be displayed on the Handheld. Select Yes or No from the drop-down list. Sending details to the Handheld will send additional data to the Handheld and could increase the synchronization times for the Handheld.

Data Type Determines the type of data that the detail will hold. Select a data type from the drop-down list. The data type selected determines the fields that will be prompted.

If a choice list data type is selected, a list must be selected. A default value may be selected from the drop-down list.

If a date data type is selected, no additional fields are prompted.

If a discrete numeric value data type is selected, the size and precision must be entered.

If a discrete text value data type is selected, a size must be entered.

If a function data type is selected, then the function must be selected from the drop-down list.

History Determines when the history of the detail will be saved. Select Always, Changes, or None from the drop-down list. Selecting “Always” will write the history for the detail anytime the detail is updated regardless if it is changed or not. Choosing “Changes” will write the history for the detail anytime the value of the detail is changed. Selecting “None” will result in no history being written for the detail.

Click the Save Add Another button to save the detail and add another detail, click the Save button to save the detail and return to the Component Detail Definitions page, or click the Cancel button without saving the detail and return to the Component Detail Definitions page.

Component Template

Reviewing a Component Template

From the Main Menu, select Admin -> Component Templates

The Component Template page is displayed.

Use one or more of the filters to determine which of the component templates will be displayed. Leaving the filter blank will show all component templates.

Enter a name or a partial name of a component template in the **Name** filter.

Enter a name or partial description of a component template in the **Description** filter.

Select one or more component types from the **Type** filter drop-down list.

Enter a name or partial tag location in the **Tag Location** filter.

Select one or more component statuses from the **Status** filter drop-down list.

Select one or more component details from the **Append Detail** filter drop-down list.

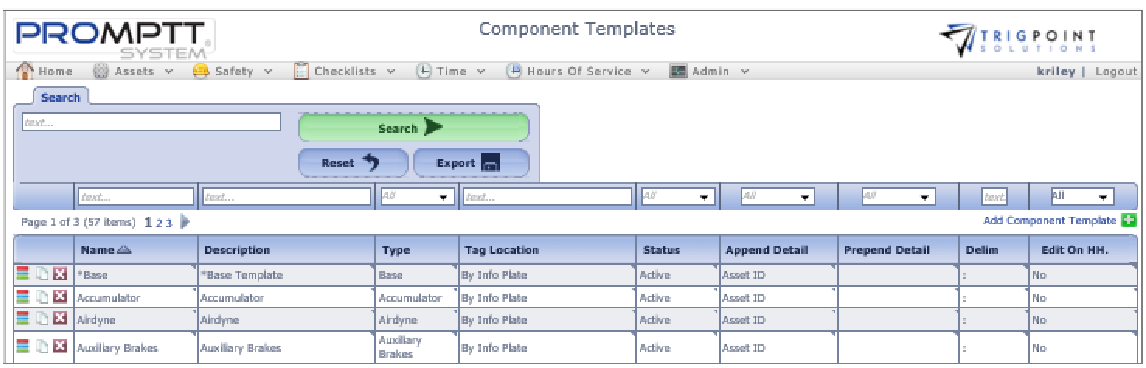
Select one or more component details from the **Prepend Detail** filter drop-down list.

Enter a single character in the **Delim** filter.

Enter a Yes, No or All in the **Edit on HH.** filter.

Click the Search button.

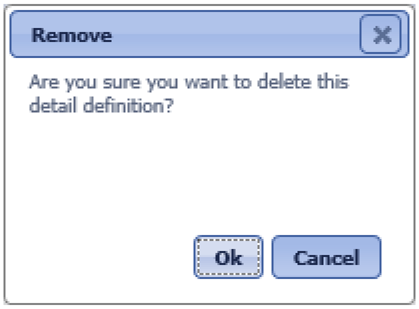
The search results are displayed.



Component Template page

To delete a template, click the Delete icon.

The Remove dialog box will be displayed.



Remove dialog box

Click the OK button to delete the template, or click the Cancel button to return to the Component Templates page without deleting the template.

Only templates that have not been used can be deleted.

Click the Details icon to see the details attached to the component template.

The Search Pages section contains additional information about search pages.

Modifying a Component Template

From the Main Menu, select Admin -> Component Templates.

The Component Templates page appears.

One or more of the filters can be used to limit the number of component templates displayed: Name, Description, Type, Tag Location, Status, Append Detail, Prepend Detail, Delim, or Edit on HH. Leave the filters blank to select all templates.

Click the Search button.

The search results are displayed.

The existing component template can be edited using inline editing. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

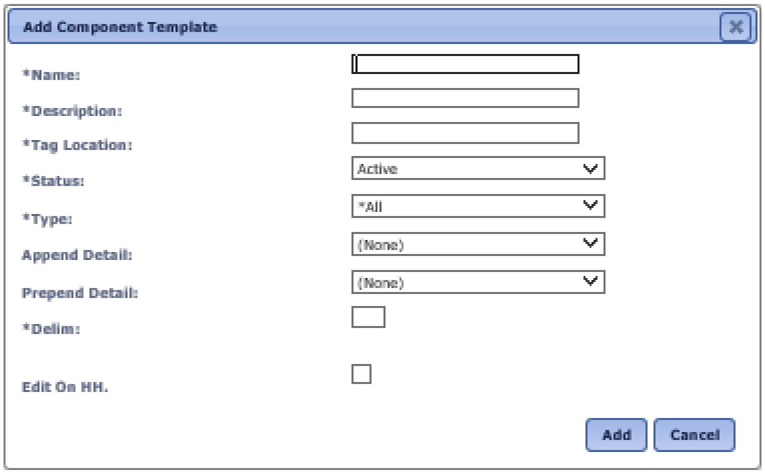
Creating and Copying a Component Template

From the Main Menu, select Admin -> Component Templates

The Component Templates page appears.

To create a new component template, click the Add icon for Add Component Template.

The Add Component Template dialog box is displayed.



Add Component Template dialog box

To copy a component template, click the Copy icon to the left of the template. Copying a component template, such as "*Base", will also add the component detail definitions of the copied template to the new component template.

The Copy dialog box is displayed.

Enter or change the data.

Name The name of the template. The template name is used as the base name for any components created using the template. Enter up to 50 characters for the name.

Description The detailed description for template. This will be the default description for any components created by the template. Enter up to 50 characters for the description.

Tag Location The location of the RFID or UHF tag on the component. This will be the default tag location for any components created by the template. Enter up to 50 characters for the tag location.

Status The default status of any component that is created from the template. Select a status from the drop-down list.

Type The default type of any component that is created from the template. Select a type from the drop-down list.

Append Detail The detail value will be appended to the name of the component when the component is created from the template. The detail must have a value in order for it to append to the name. Select a detail from the drop-down list.

Prepend Detail The detail value will be prepended to the name of the component when the component is created from the template. The detail must have a value in order for it to prepend to the name. Select a detail from the drop-down list.

Delim The delimiter between the append detail or the prepend detail and the name of the component. Enter a single character for the delimiter.

Edit on HH. Click the checkbox to allow any components created from the template to be edited on the Handheld.

All of the fields, with the exception of Prepend Detail and Append Detail, are required to create a component template.

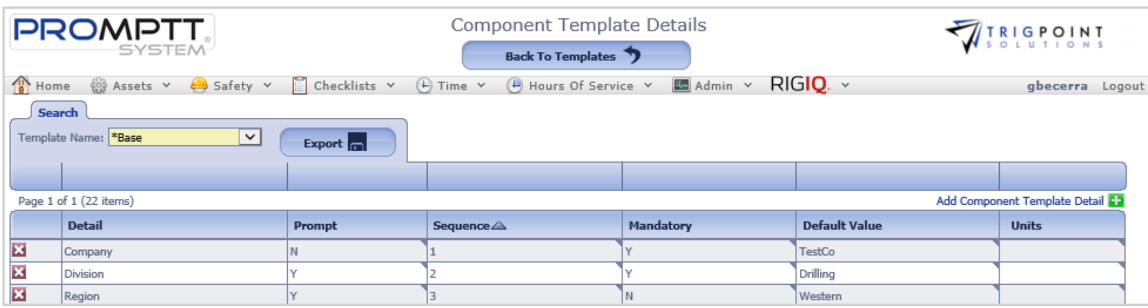
Click the Add button to save the template or click Cancel button to return to the previous page without saving the template.

Creating a Component Template Detail

After creating a component template, the details to be associated with the template can be added.

After performing a component template search, click on the Details icon .

The Component Template Details page is displayed

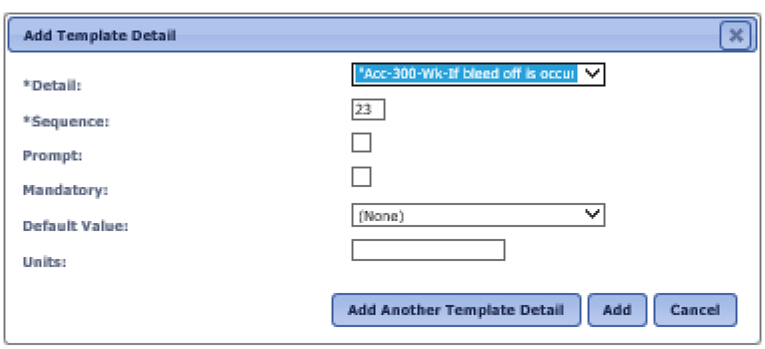


Component Template Details page

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Click the Add icon for Add Component Template Detail.

The Add Template Detail dialog box is displayed.



Add Template Detail dialog box

Enter the data for the following fields

Detail Select a detail to add to the component detail from the drop-down list of detail definitions.

Sequence The sequence determines the detail display order when creating components. Enter a number.

Prompt The Prompt field determines whether the template asks for the detail information when a component is being created. Checking the box will prompt for the detail value.

Mandatory The Mandatory field determines if the detail is required when creating or modifying a component. Checking the box makes the detail required.

Default Value Used for the typical answer or if there is only one valid value. Details that are a data type of Choice List will display a drop-down list of valid values for the detail. Details that are a data type of Date will display a calendar from which to select the date.

Units The unit of measurement for the detail. Enter up to 50 characters for the unit.

Click the Add button to save the details, click the Add Another Template Detail button to add more component details to the template, click the Add button to add the detail and return to the Component Template Detail page, or click the Cancel button to return to the Component Template Detail page without saving the detail.

Click the Back to Template button at the top of the Component Template Details page to return to the Component Templates page.

Modifying a Component Template Detail

After performing a component template search, click on the Details icon to bring up the Component Template Details page.

The existing component template details can be edited using inline editing. Data cells that can be modified will have a triangle in the upper right-hand corner of the cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

Click the Back to Template button at the top of the Component Template Details page to return to the Component Templates page.

Item Templates

Item Templates are used to create items in a consistent manner. The template contains the default values and the details for that type of item. The details in the template can be mandatory or optional and are presented in whatever order is specified in the template.

Reviewing Item Templates

From the Main Menu, select Admin -> Item Templates

The Item Templates page is displayed.

Use one or more of the filters to determine which of the item templates will be displayed. Leaving the filter blank will show all item templates.

Enter a name or a partial name of an item template in the **Template Name** filter.

Select one or more item categories from the **Category** filter drop-down list.

Select one or more item types from the **Item Type** filter drop-down list.

Enter a name or partial description of an item template in the **Description** filter.

Enter a numeric value in the Item **Reorder Qty** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

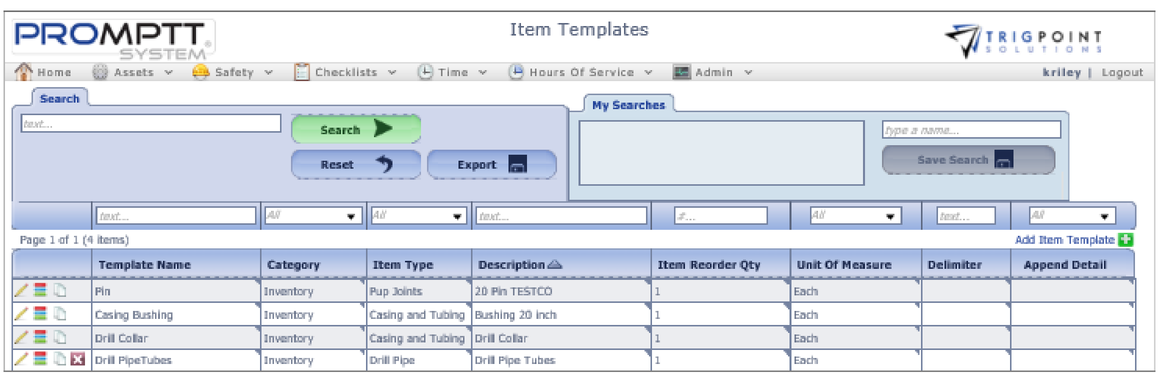
Select one or more units of measure from the **Unit of Measure** filter drop-down list.

Enter a single character in the **Delimiter** filter.

Select one or more item details from the **Append Detail** filter drop-down list.

Click the Search button.

The Item Templates page appears.



Item Templates page

To delete a template, click the Delete icon .

The Delete dialog box will be displayed.

Click the OK button to delete the template, or click the Cancel button to return to the Item Templates page without deleting the detail.

Only templates that have not been used can be deleted.

Click the Details icon to see the details attached to the item template.

The Search Pages section contains additional information about search pages.

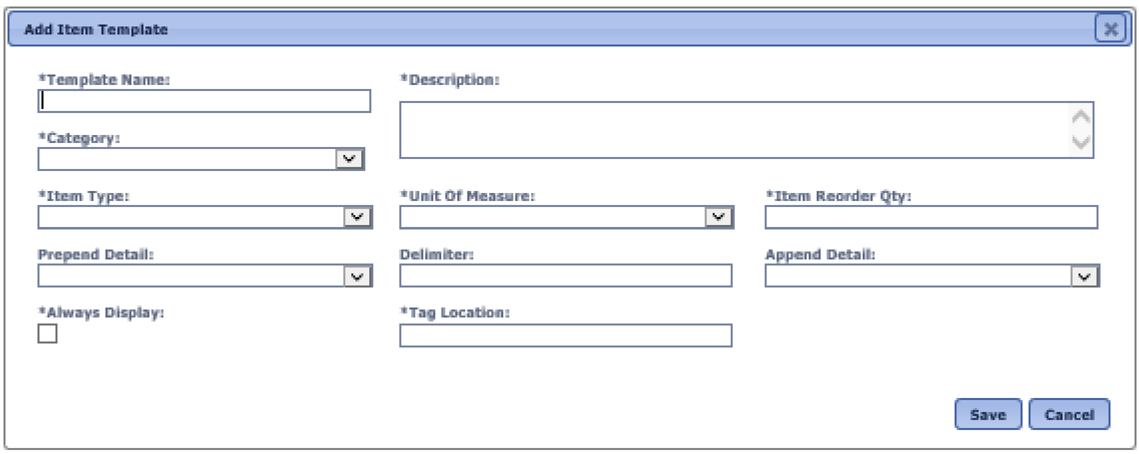
Creating and Copying an Item Template

After performing an item template search, click the Copy icon to the left of the template to copy the item template.

The Copy Item Template dialog box is displayed with the information defaulted from the original template.

To create a new item template, click the Add icon for Add Item Template.

The Add Item Template dialog box is displayed.



Add Item Template dialog box

To modify an item template, click the Pencil icon to left of the template.

The Edit Item Template dialog box is displayed.

Enter or change the data.

Template Name The template name is used as the base name for any items created using the template. Enter a unique 50-character template name.

Description The description will be displayed when looking at inventory. Enter the detailed description for template. Enter up to 900 characters for the description.

Category The default category when creating an item from the template. Categories are used for grouping and reporting purposes. Select a category from drop-down list.

Item Type The default item type when creating an item from the template. Item Type are used for grouping and reporting purposes. Select a type from drop-down list.

Unit of Measure The default unit of measure when creating an item from the template. Select a unit of measure from the drop-down list.

Item Reorder Qty The quantity at which the item should be reordered. This will be the default value for any items created using the template. Enter a whole number between 0 and 2147483647.

Prepend Detail The detail is prepended to the template name to create the item name. Enter a detail from the drop-down list or leave blank. The detail must have a value in order to prepend to the item name.

Delimiter This value will be used between the Prepend Detail Name, the template name, and the Append Detail Name when creating the item name. Enter up to three characters or leave blank.

Append Detail The detail is appended to the template name to create the item name. Enter a detail from the drop-down list or leave blank. The detail must have a value in order to append to the item name.

Always Display Items with this box checked will always be displayed, regardless of their inventory quantity, when looking at inventory.

Tag Location The default tag location for any item created using the template. This can be modified when creating the item from the template. Enter a text value.

All of the fields with an asterisk (*) are required to create an item template.

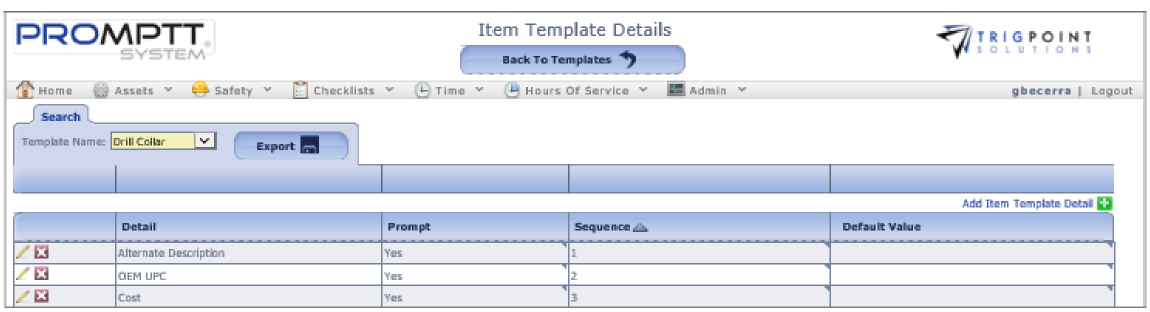
Click the Save button to save the template or click Cancel button to return to the Item Templates page without saving the template.

Adding an Item Template Detail

After creating an item template, the details to be associated with the template can be added.

After performing an item template search, click on the Details icon to the left of the template to bring up the Item Template Details page for the item.

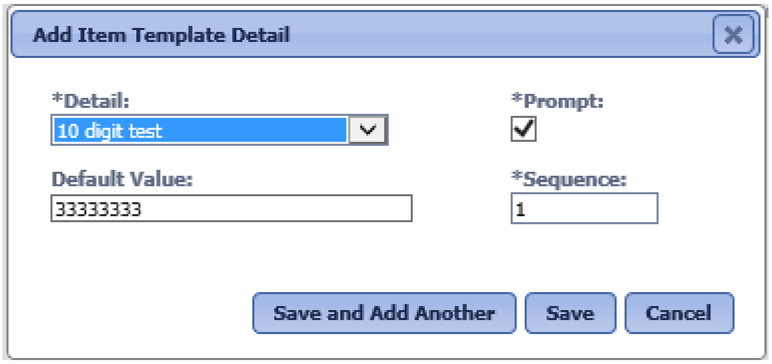
The Item Template Details page is displayed.



Item Template Details page

Click the Add icon for Add Item Template Detail.

The Add Item Template Detail dialog box is displayed.



Add Template Detail dialog box

Enter the data for the following fields

Detail Select a detail to add to the item template from the drop-down list of detail definitions.

Prompt The prompt determines whether the template asks for the detail information when an item is being created. Click the checkbox to prompt for the value when creating or modifying an item.

Default Value Used for the typical answer or if there is only one valid value. Details that are a data type of Choice List will display a drop-down list of valid values for the detail. Details that are a data type of Date will display a calendar from which to select the date.

Sequence The sequence determines the detail display order when creating items. Enter a number.

Click the Save button to save the changes, click the Save and Add Another button to add more item details to the template, or click the Cancel button to return to the Item Template Detail page without saving the changes.

Click the Back to Template button at the top of the Item Template Details page to return to the Item Templates page.

Modifying an Item Template Detail

After performing an item template search, click on the Details icon to the left of the template to bring up the Item Template Details page.

The existing item template details can be edited using inline editing. Data cells that can be modified will have a triangle in the upper right-hand corner of the cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

Another method of editing the template details is to click the pencil icon to the left of the detail.

The Edit Item Template Detail dialog box is displayed with the current values for the detail.

Modify the fields and click the Save button to save the changes, or click the Cancel button to return to the Item Template Details page without making any changes.

Click the Back to Template button at the top of the Item Template Details page to return to the Item Templates page.

Items

Reviewing Items

Items are created with the use of templates. The template is selected for the type of item to be created and the details are displayed for entry. Any blind detail defaults are added behind the scenes and any other default values are pre-entered on the screen. The details are displayed on the screen in the order specified in the selected template. The mandatory details are denoted with an asterisk (*) and require information to be entered in order to create the item.

From the Main Menu, select Admin -> Items.

The Items page is displayed.

Use one or more of the filters to determine which of the items will be displayed. Leaving the filter blank will show all items.

Select one or more categories from the **Category** filter drop-down list.

Select one or more item types from the **Item Type** filter drop-down list.

Enter a description or a partial description of an item in the **Description** filter.

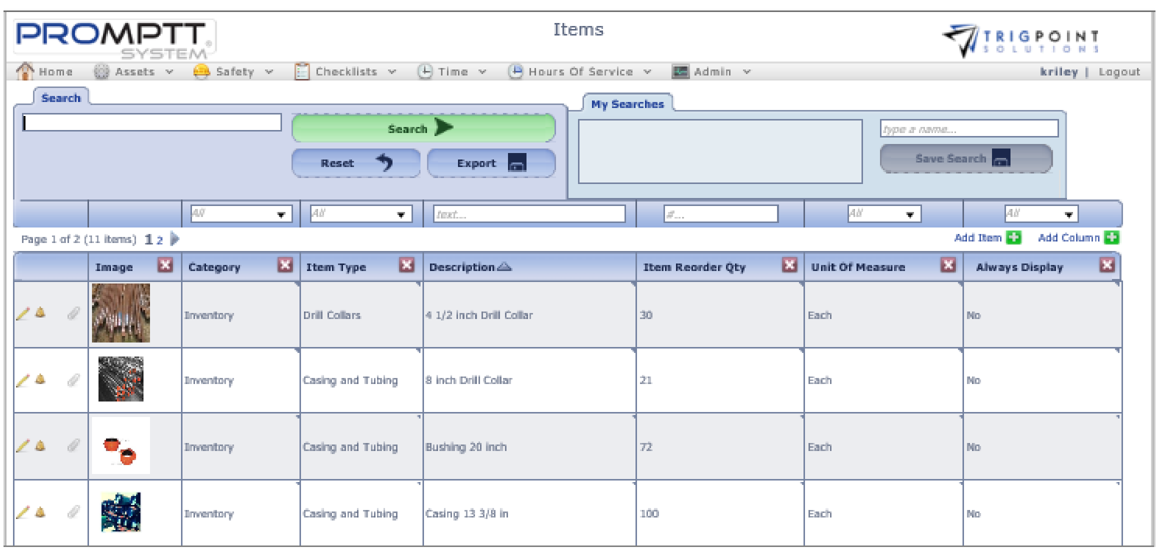
Enter a numeric value in the Item **Reorder Qty** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select one or more units of measure from the **Unit of Measure** filter drop-down list.

Select Yes, No, or All from the **Always Display** filter drop-down list.

Click the Search button.

The results of the search are displayed.



Items page

Use the Bell icon to see any notifications for the item

The Paper clip icon indicates that the item has an attachment.

The Search Pages section contains additional information about search pages.

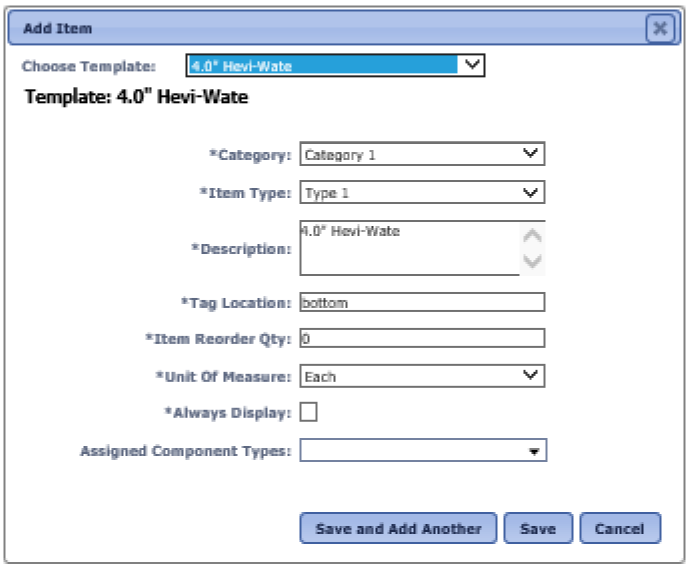
Creating and Modifying an Item

After performing an item search, click on the Pencil icon to the left of the item to edit an item.

The Edit Item dialog box is displayed.

To create a new item, click the Add icon for Add Item.

The Add Item dialog box is displayed.



Add Item dialog box

Note: Fields are specific, according to the template selected.

Select a template from the drop-down

The full dialog box will be displayed after a template is selected. All of the required fields will default to the values setup in the template. Any detail definitions associated with the template that have the prompt flag set to "Yes" are also displayed.

Enter or modify the following fields

Category Categories are used for grouping and reporting purposes. This will default to the value set up in the template, or select a category from drop-down list.

Item Type Item Type are used for grouping and reporting purposes. This will default to the value setup in the template, or select a type from drop-down list.

Description A unique detailed description for the item. This will default to the value setup in the template, or enter a new text value. If there is an append or prepend detail definition set up in the template these will be added to the item description when the item is saved for the first time. Enter up to a 900 characters for the description.

Tag Location The tag location for the item. This will default to the value setup in the item template, or enter a new text value of up to 50 characters.

Item Reorder Qty The quantity at which the item should be reordered. This will default to the value setup in the template, or enter a new value. Enter a whole number between 0 and 2147483647.

Unit of Measure The unit of measure for the item. This will default to the value setup in the template, or select a unit of measure from the drop-down list.

Always Display Items with this box checked will always be displayed when looking at inventory, regardless of their inventory quantity. This will default to the value setup in the template.

Assigned Component Types A multi-select drop-down list of component types that can be used for groupings and reporting purposed. It is not a mandatory field and can be left blank.

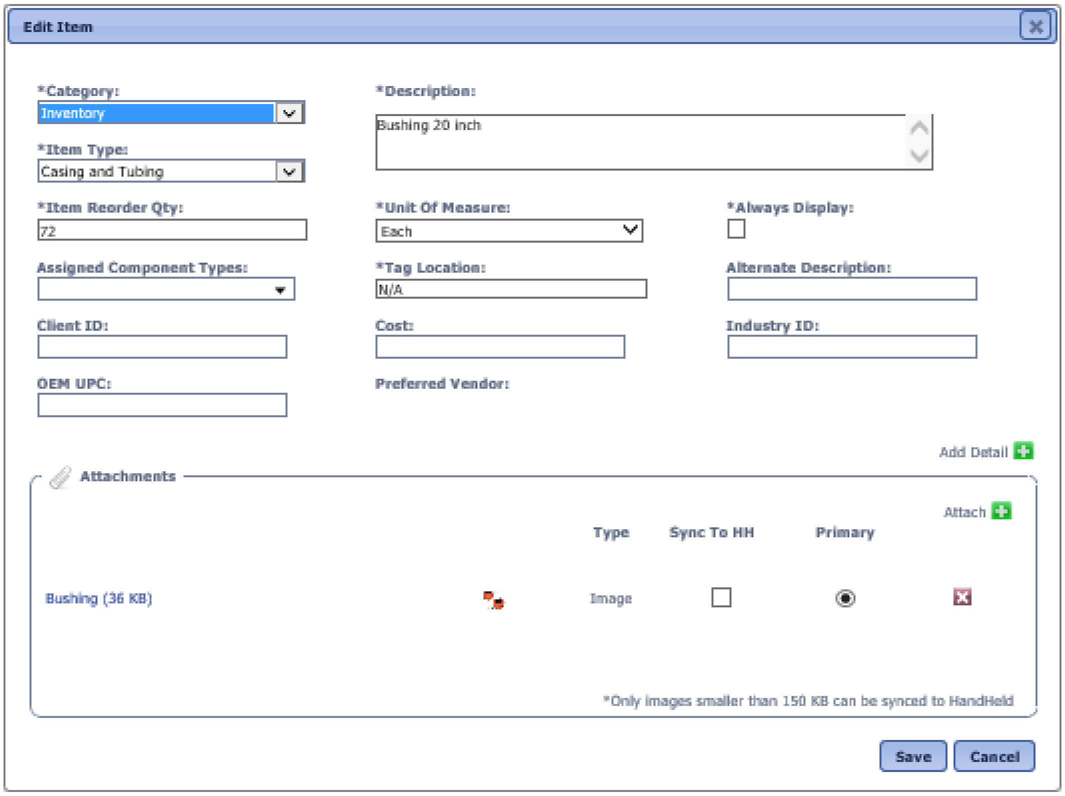
Detail Definition fields Any detail definitions that had the prompt flag set to "Yes" in the item template will be available for modification. These will default to the value set up in the item template, if a default was setup. If there is no default value setup in the template, it will default to the value setup in the detail definition when available. If the detail definition has the mandatory flag set to "Yes", these fields will be required.

Click the Save and Add Another button to add another item, click the Save button to save the changes and return to the Item Search page**,** or click the Cancel button to return to the previous page without saving the changes.

Adding an Item Detail

After performing an item search, click the Pencil icon to the left of the item.

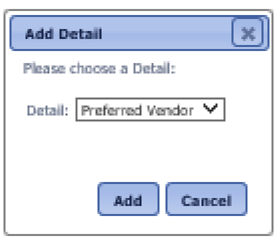
The Edit Item dialog box is displayed.



Edit Item dialog box

Click the Add icon for Add Detail.

The Add Item Detail dialog box is displayed with a list of details that can be added to the item.



Add Detail dialog box

Select a detail click the Add button to add the detail to the item, or click the Cancel button to return to the Edit Item dialog box without adding the detail.

If the detail definition had a default value setup for the detail, the detail will default to that value.

Details that are a data type of list will display a drop-down list of valid supplemental lists that can be selected. Details that are a data type of Date will display a calendar.

Modify the detail and click the Save button to save the value, or click the Cancel button to return to the previous page without saving the changes.

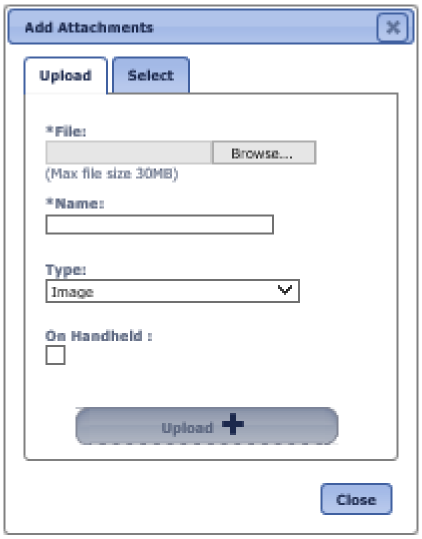
Creating and Deleting Attachments

After performing an item search, click the Pencil icon to the left of the item

The Edit Item dialog box is displayed.

Click on the Add icon for Attach in the Attachments pane.

The Add Attachments dialog box is displayed.



Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

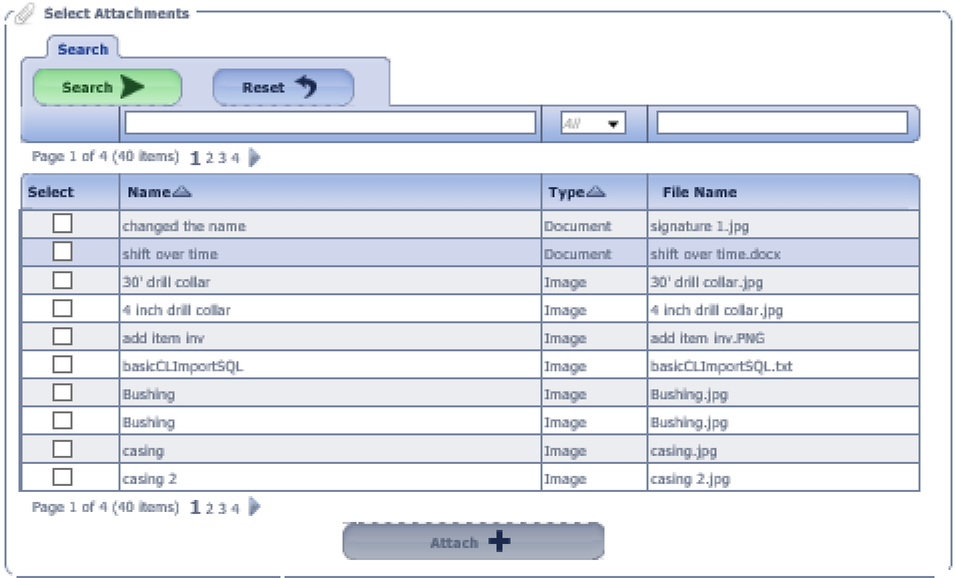
Enter the Name and select the type of attachment.

If the attachment is an image that is to be synchronized to the Handheld, click the On Handheld box.

Click the Upload button. Click the Browse button to add another attachment or click the Close button to return to the Attachments tab.

The attachment is now associated with the item.

To add an existing image, click the Select tab.



Add Attachments dialog box – Select

The Select Attachments dialog box is displayed with a list of attachments.

Use one or more of the following filters to determine the attachments to be displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for any attachments on the page that are to be added to the item, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

The attachment is now associated with the item.

The primary image for an item will be displayed in the Items and Inventory pages. To set an image as the primary image, click the radio button under the primary column in the Attachments pane. Only one image may be a primary image.

The checkbox to Synchronize to the Handheld can be modified in the Attachments pane. If the box is checked, the image will be sent to the Handheld. If it is unchecked, the image will not be sent. Please note that the size of the images that can be synchronized to the Handheld is user defined.

To delete an attachment, click the Delete icon to right of the attachment.

Tasks

Setting up Tasks

There are many parts to setting up tasks.

- **Reject Codes** The reasons to reject a task list, component, or individual task or the reason why a component scan was skipped during tasking. Reject Codes are maintained in the primary lists.
- **Reject Code Types** Used to group reject codes together by type for grouping and reporting purposes. Reject Code Types are maintained in the primary lists.
- **Response Lists** contain all of the drop-down lists used for answers in tasks. Any time a drop-down list is applicable, a response list should be set up. The use of response lists gives a consistent set of answers for specific tasks, making reports more meaningful.
- **Maintenance Plan Types** Used to group task assignments (maintenance plans) together for reporting purposes. Maintenance Plan Types are maintained in the primary lists.
- **Instruction Type** The instruction types are used to determine which instructions a task profile will use when generating the task list. The system comes preloaded with an instruction type of *No Instructions and the user can add any additional instruction types required. Instruction Types are maintained in the primary lists.
- **Response Type** Response Types are used to define the type of answer or action that will be required when as instruction is completed in a task. The system comes preloaded with the response types and the user can view them.
- **Instructions** Used to define who should do a task, what should be done, and when it should be done.
- **Instruction Groups** Used to group instructions together into logical execution groups such as running and static.
- **Task Assignments** Task Assignments (maintenance plans) define which instructions will be assigned to which components types. The instructions are assigned to plans and then the plans are assigned to component types. Using this technique automatically assigns the instruction to all components of a specific type. Likewise, any newly created components will automatically get all the instructions for its type assigned to it.
- **Task Profiles** Task Profiles determine the frequency of the task list generation, control the selection criteria for the instructions to be included in the task list, and generate the task lists when executed.
- **Task Lists** Task lists are the combination of instructions and components that will be answered on the Handheld or website. The Task List has a set of components and instructions for each component.

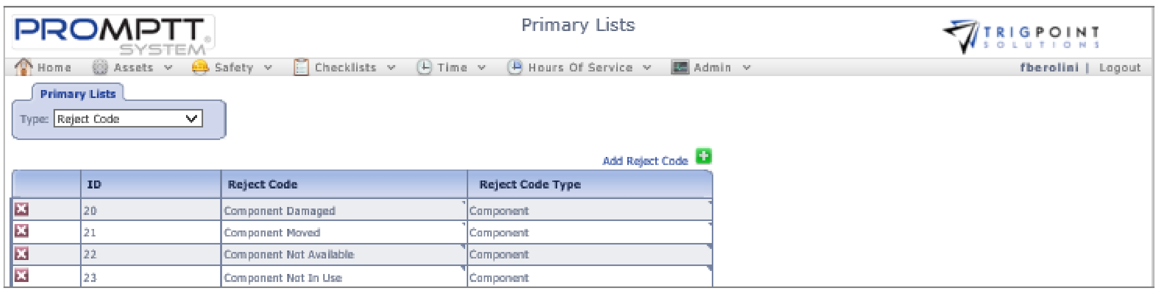
Creating and Modifying a Reject Code

When a user cannot complete a group, instruction, or component during task completion, they can reject it. A reject code must be selected when rejecting a group, instruction, or component. Rejects codes are also required when skipping a component scan during tasking. The reject codes are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

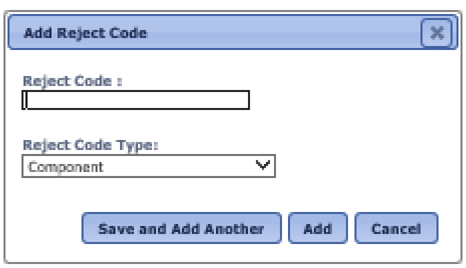
Select Reject Code in the Type drop-down list.



Primary Lists page – Reject Code

Click the Add icon for Reject Code.

The Add Reject Code dialog box is displayed.



Add Reject Code dialog box

Enter a Reject Code name of up to 50 characters.

Select the Reject Code type from the drop-down list.

Click the Save and Add Another button to add another Reject Code, click the Add button to save the changes, or click the Cancel button to return to the previous page without saving the changes.

Reject codes are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

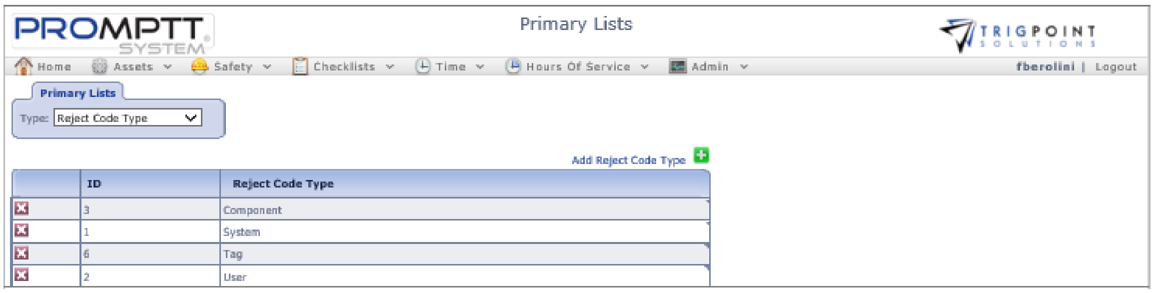
Creating and Modifying a Reject Code Type

Reject Code Types are using for grouping and reporting purposes.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

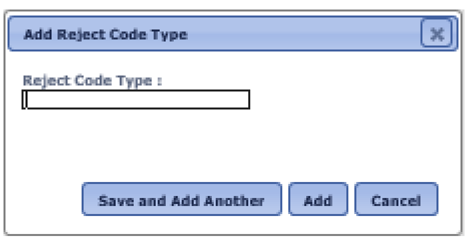
Select Reject Code Type from the Type drop-down list.



Primary Lists page – Reject Code Type

From the Reject Code Type page, click the Add icon for Reject Code Type.

The Add Reject Code Type dialog box is displayed.



Add Reject Code Type dialog box

Enter a Reject Code Type name of up to 50 characters.

Click the Save and Add Another button to add another Reject Code Type, click the Add button to save the changes, or click the Cancel button to return to the previous page without saving the changes.

Reject code types are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Creating and Modifying Instruction Types

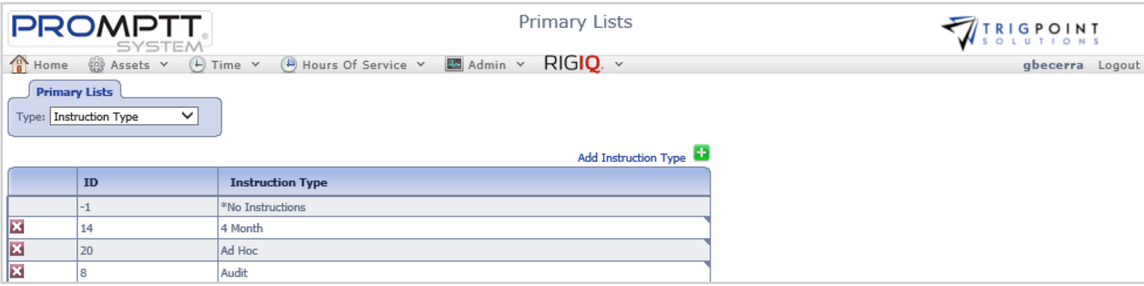
Instruction Types are used to identify and select similar groups of instruction when reporting and for use when executing a Task Profile. The system comes preloaded with an instruction type of *No Instructions and the user can add any additional instruction types required. Instruction Types are maintained in the primary lists.

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Instruction Type from the drop-down list.

A list of Instruction types is displayed.



Primary lists – Instruction Type

The user added Instruction types can be edited using inline editing. If a field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

To create a new instruction type, click the Add icon for Add Instruction Type.

The Add Instruction Type dialog box is displayed.

Add Instruction Type dialog box

Enter an Instruction Type of up to 50 characters.

Click the Save and Add Another button to save the changes and add another, click the Add button to save the changes and return to the Primary List page or click the Cancel button without saving the changes and return to the Primary List page.

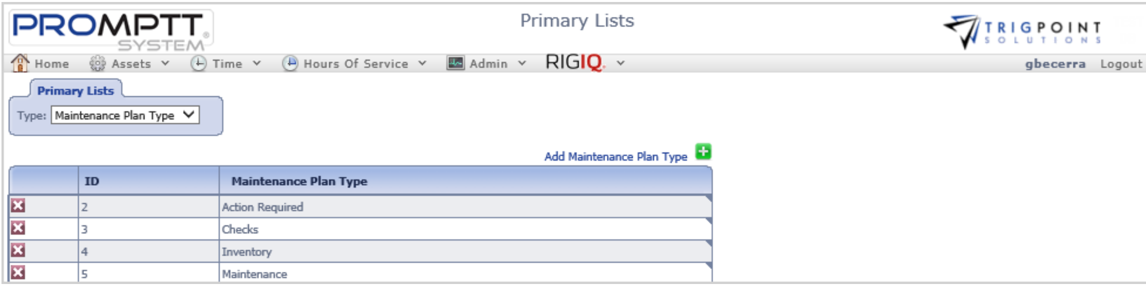
Creating and Modifying a Maintenance Plan Type

Maintenance Plan Types are using for grouping and reporting the different task assignments.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

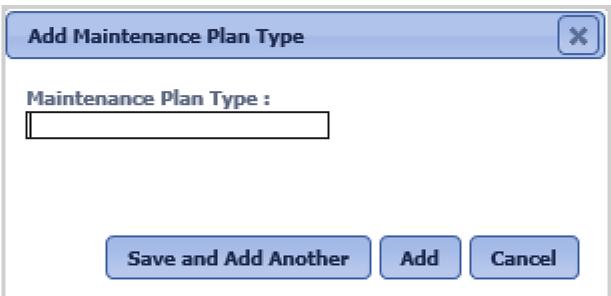
Select Maintenance Plan Type from the Type drop-down list.



Primary Lists page – Maintenance Plan Type

From the Maintenance Plan Type page, click the Add icon for Maintenance Plan Type.

The Add Maintenance Plan Type dialog box is displayed.



Add Maintenance Plan Type dialog box

Enter a Maintenance Plan Type name of up to 50 characters.

Click the Save and Add Another button to add another Maintenance Plan Type, click the Add button to save the changes, or click the Cancel button to return to the previous page without saving the changes.

Maintenance Plan types are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Creating and Modifying a Response Type

Response Types are using to define the type of answer or action that will be required when as instruction is completed in a task. The system comes with preloaded with the response types and the user can view them.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

Select Response Type from the Type drop-down list.

Primary Lists page – Response Type

Creating and Modifying a Task Profile Type

Task Profile Type determines how the task profile is to be run. The system comes with preloaded with the response types and the user can view them.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

Select Task Profile Type from the Type drop-down list.

Primary Lists page – Task Profile Type

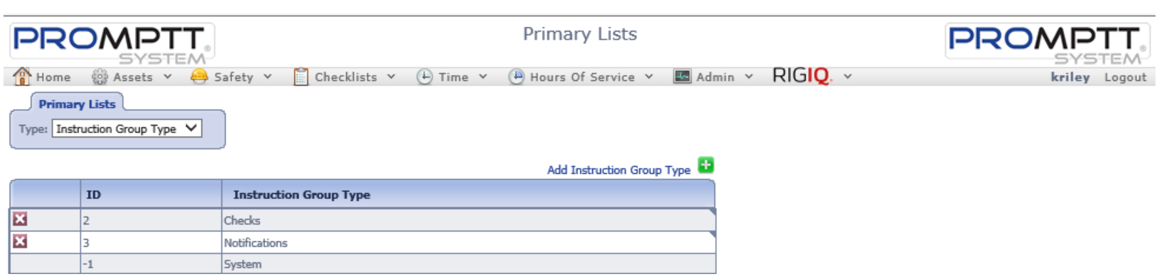
Creating and Modifying an Instruction Group Type

Instruction Group Types are using to sort and select the instruction groups.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

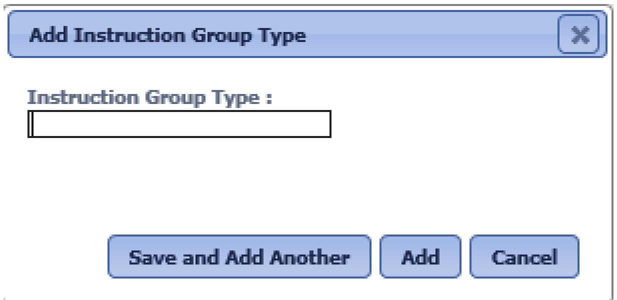
Select Instruction Group Type from the Type drop-down list.



Primary Lists page – Instruction Group Type

From the Instruction Group Type page, click the Add icon for Instruction Group Type.

The Add Instruction Group Type dialog box is displayed.



Add Instruction Group Type dialog box

Enter a Type name of up to 50 characters.

Click the Save and Add Another button to add another Instruction Group Type, click the Add button to save the changes, or click the Cancel button to return to the previous page without saving the changes.

Instruction Group types are modified using the inline editing feature. If the field can be modified, it will have a small triangle in the upper right-hand corner of the data cell. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell or the Esc key to cancel the change.

Creating and Modifying an Instruction Choice list

Instruction choice lists are user defined lists that can be used with instructions. The use of choice lists makes data entry easy and aids in keeping the data consistent.

From the Main Menu, select Admin -> Instruction Choices

The Instruction Choices page is displayed.

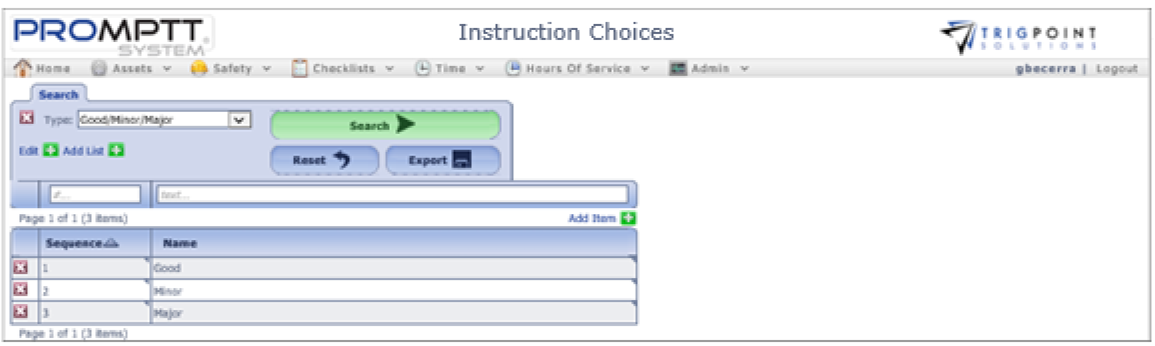
Select a choice list from the Type filter.

Use one or more of the filters to determine which of the choice list elements will be displayed. Leaving the filter blank will show all elements.

> Enter a numeric value in the **Sequence** filter. The less than, greater than or equals symbol can be used immediately preceding the value.
>
> Enter a name or a partial name of a choice list in the **Name** filter.

Click the Search button

The results of the search are displayed.

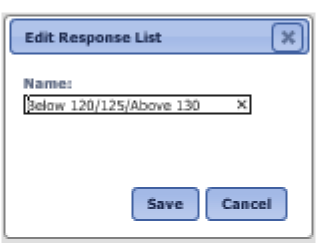


Instruction Choices page

To delete a choice list click the Delete icon next to the Type field. Only choice lists that have not been used in the system may be deleted.

To modify the name of the choice list, click the Add icon in the upper right-hand corner next to the word "Edit".

The Edit Response List dialog box is displayed.



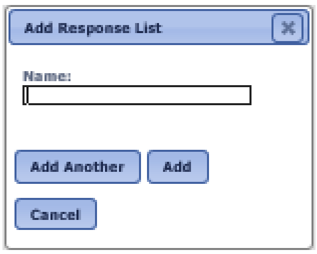
Edit Response List dialog box

Enter up to 50 characters for the Name of the choice list.

Click the Save button to save the changes and return to the Instruction Choices page or click the Cancel button without saving the changes and return to the Instruction Choices page.

To add a new choice list, click the Add icon for Add List.

The Add Response List dialog box is displayed.



Add Response List dialog box

Enter up to 50 characters for the Name of the choice list.

Click the Save and Add Another button to save the changes and add another, click the Add button to save the changes and return to the Primary List page, or click the Cancel button without saving the changes and return to the Primary List page.

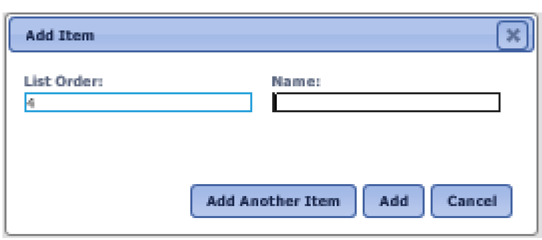
To modify the elements of an existing choice list, select the Choice List Type to edit.

The existing instruction choice lists elements can be edited using inline editing. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list, and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add an element to a choice list, select the Choice List Type to edit.

Click the Add icon for Add Item.

The Add Item dialog box is displayed.



Add Item dialog box

Enter a whole number for the list order.

Enter up to 50 characters for the name of the element.

Click the Add Another Item button to save the changes and add another, click the Add button to save the changes and return to the Instruction Choices page or click the Cancel button without saving the changes and return to the Instruction Choices page.

To delete a choice list element, click the Delete icon to the left of the element. Only elements that have not been used in the system may be deleted.

Instructions

Instructions are used to define who should do a task, what should be done, and when it should be done.

Reviewing Instructions

From the Main Menu, select Admin -> Instructions.

The Instruction Search page appears.

Use one or more of the filters to determine which of the instructions will be displayed. Leaving the filter blank will show all instructions.

Select one or more instruction types from the **Type** filter drop-down list.

Enter a name or a partial name of an instruction in the **Name** filter.

Enter display text or part of the display text in the **Display Text** filter.

Select one or more user types from the **User Type** filter drop-down list.

Select one or more skill levels from the **Skill** filter drop-down list.

Select Sub, Master, or All from the **S/M** filter.

Enter a numeric value in the **Freq** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

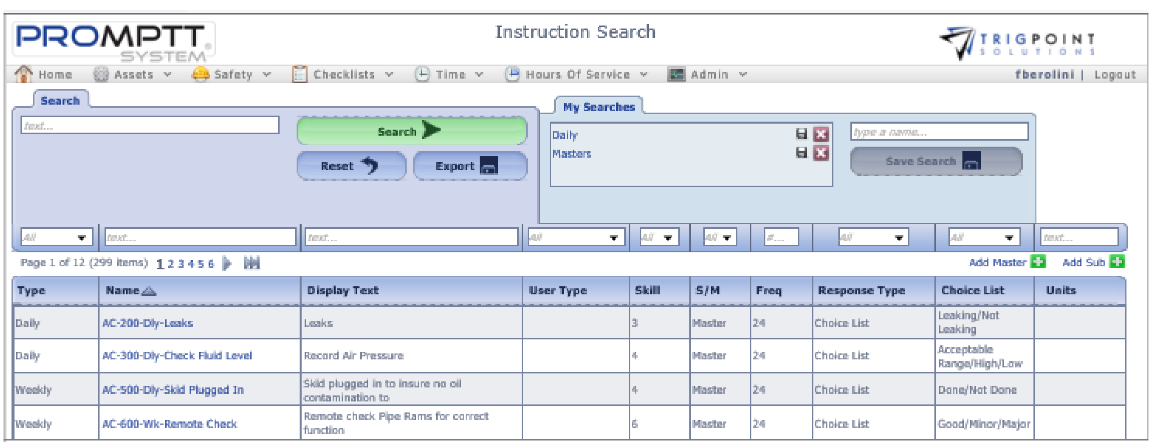
Select one or more response types from the **Response Type** filter drop-down list.

Select one or more choice lists from the **Choice List** filter drop-down list.

Enter a unit of measure or partial unit of measure in the **Units** filter.

Click the Search button.

The results of the search are displayed.



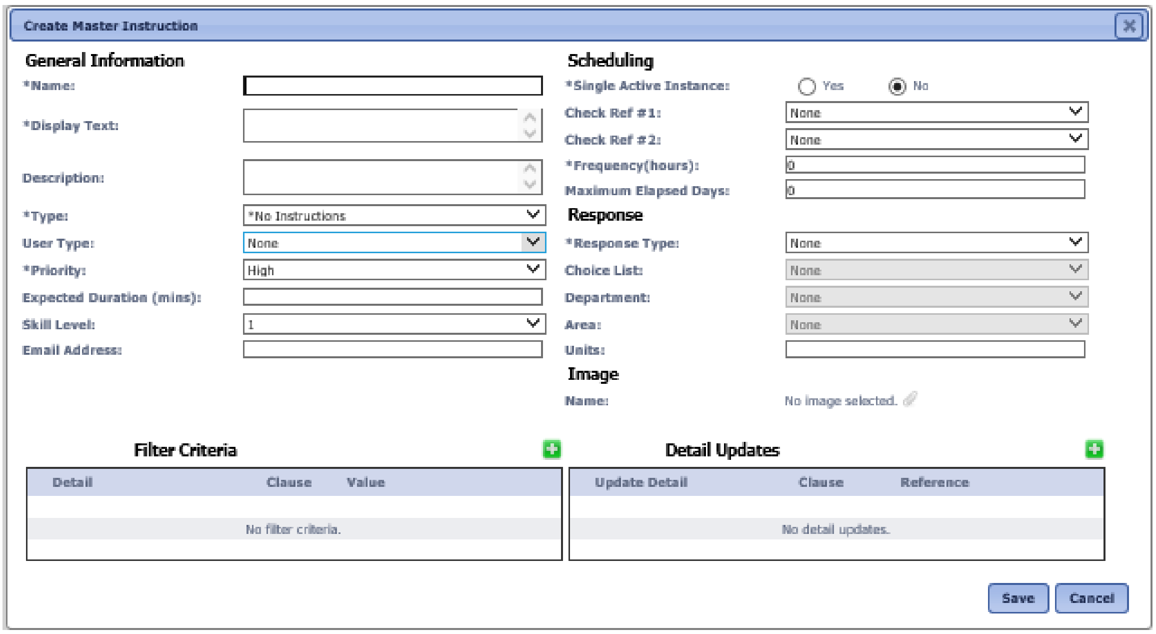
Instruction Search page

The [Search Pages](#) section contains additional information about search pages.

Creating and Modifying Master Instructions

After performing an instruction search, click the Add icon for Add Master to add a new master instruction.

The Create Master Instruction dialog box is displayed.



Create Master Instruction dialog box

To change an existing master instruction, click on the name of the master instruction to be modified.

The Edit Master Instruction dialog box is displayed.

Enter or modify the following fields

Name The unique name of the instruction. Enter up to 50 characters for the name.

Display Text This text is displayed on the Handheld for the task. Enter up to 50 characters for the display text.

Description The text displayed when viewing more information on the Handheld for the task. Enter up to 900 characters for the description.

Type The instruction type is used to group instructions together and to select instructions for task profiles. Select an instruction type from the drop-down list.

User Type Is used to denote if the instruction should only be completed by a specific type of user. The task profile will use this when set to use instructions for a specific user type. Select a user type from the drop-down list or leave as None to select all user types.

Priority Is used to assign importance to the instruction. Select High, Medium, or Low from the drop-down list.

Expected Duration The number of minutes expected to complete the instruction. Enter a number between 0 and 2147483647.

Skill Level The skill level used to denote if the instruction should only be completed by a user with a specific skill level. The task profile will use this when set to use instructions for a specific skill level. If it is left blank, then all skill levels can complete the instruction. Select a skill level from the drop-down list or leave blank.

Email Address The email address entered will have a reminder or notification sent to it when the Response Type field is set to *Notification or *Reminder. Enter a valid email address.

Units The unit of measurement for the response type. Enter a unit of measurement of up to 50 characters.

Single Active Instance Limits the number of active instances of an instruction for a component. If an instruction is marked “Yes” for single active instance, there can still be multiple components with the same instruction, just not the same component with the same instruction at the same time.

Check Ref The Check Ref field is used in conjunction with the frequency field to determine when an instruction should be activated for pickup by the task profile. The value of the detail in Check Ref #2 is subtracted from the value of the detail in Check Ref #1. When that value reaches the value in the Frequency Field then the task profile is executed to create a task list with the instruction. Below are two example of this.

> **Example**
>
> Check ref #1 = Current Hours = 812
>
> Check ref #2 = Hours at last change = 523
>
> Frequency = 500
>
> The instruction would be activated when the Current hours (ref #1) minus the Hours at last change ref #2 equal the Frequency (500), or when the Current Hours = 1023. The details and frequency can be any unit of measurement. Select a detail from the drop-down list.

Maximum Elapsed Days Determines when an instruction should be activated. If the date last completed for a component plus the max elapsed days is equal to today, then the instruction will be activated for that component. Enter a whole number between 0 and 2147483647.

Response Type Determines what information the instruction will gather or what activity will be initiated by the instruction. The information could be entered when the task is initiated on the Handheld or a system value such as current user, component ID, or current date & time. An activity could create a work order or update the component’s details. Select a response type from the drop-down list.

Instructions with a response type of *Generate Work Order will create a work order when the tasks on the plan are completed. It will use the information set up in the instruction.

Instructions with a response type of *Notification will create a notification when a task profile is executed for the instruction type. If the instruction has an email address, the notification will be sent to the email address. Instructions with this response type should have an instruction type of *No instructions, so that an instruction will not be created.

Instructions with a response type of *Reminder will create a reminder when a task profile is executed for the instruction type. If the instruction has an email address, the reminder will be sent to the email address. Instructions with this response type should have an instruction type of *No instructions, so that an instruction will not be created.

*Update Component Details reserved for future use.

*User Password reserved for future use.

Choice List The response list if the response type is a choice list. Select a choice list from the drop-down list.

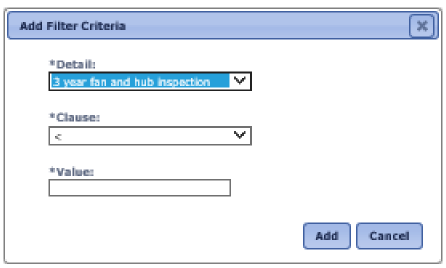
Units The units of measurement for the response. Enter up to 50 characters for the unit.

Image Allows an image to be attached to an instruction for display on the Handheld.

The Filter Criteria pane limits when the instruction can be activated based on a value of a detail or multiple details.

Click the Add icon to the right of the Filter Criteria.

The Add Filter Criteria dialog box is displayed.



Add Filter Criteria dialog box

Enter the following information.

Detail The detail upon which the select will be based. Select a detail from the drop-down list.

Clause Determines the action that will be used to compare against the detail. Select a clause from the drop-down list.

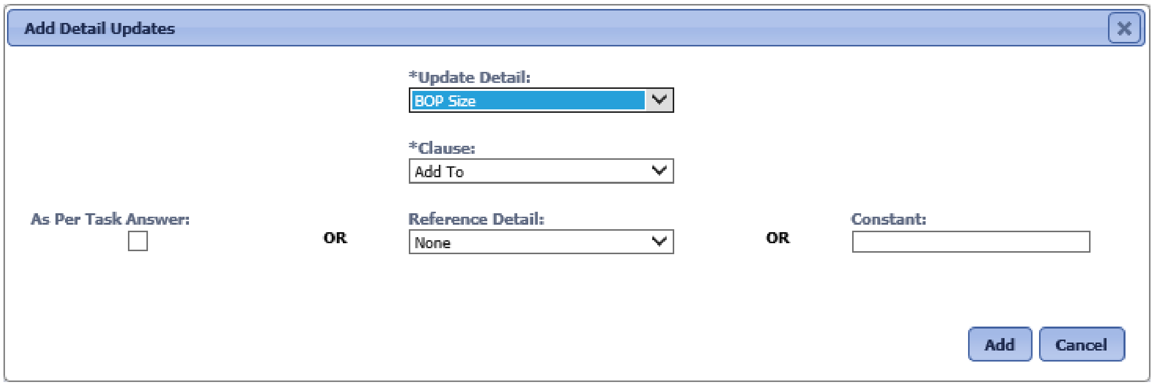
Value The value against which the detail is to be compared. A keyword can be used here. See the Keyword section on more information about using keywords.

Click the Add button to save the Detail Update and return to the instruction, or click the Cancel button to return to the instruction without making any changes.

The **Detail Updates pane** is used to update component details. The detail can be updated with the answer to the instruction, the value of another detail, or a constant value. The detail is added to, subtracted from, or replaced depending on the data type of the detail being updated.

Click the Add icon to the right of the Detail Updates

The Add Detail Updates dialog box is displayed.



Add Detail Updates dialog box

Update Detail The detail that is to be updated. Select a detail from the drop-down list.

Clause Determines the action that will be performed on the detail. Select a clause from the drop-down list.

Select one of the three options with which to update the detail.

As Per Task Answer The answer to the instruction will be used to update the detail. Click the checkbox to use the answer.

Reference Detail The value in this detail will be used to update the detail. Select a detail from the drop-down list.

Constant The value with which to update the detail. Keywords can be used here. See the Keywords section for more information about using keywords. Enter a value or keyword.

Click the Add button to save the Detail Update and return to the instruction or click the Cancel button to return to the instruction without making any changes.

Fields marked with an asterisk (*) are required to create a new instruction.

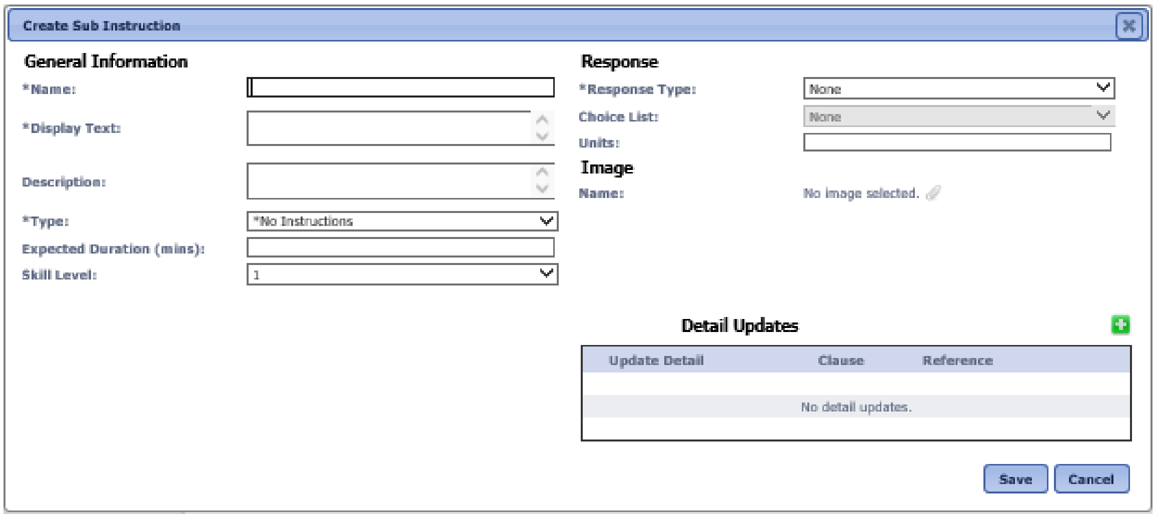
Click the Add button to save the instruction, the Save and Add Another button to add another instruction, or click Cancel to return to the previous page without saving the instruction.

Creating and Modifying Sub-instructions

Sub Instructions are linked to other instructions.

After performing an instruction search, click the Add icon for Add sub to add a new sub instruction.

The Create Sub Instruction dialog box is displayed.



Create Sub Instruction dialog box

To modify an existing sub instruction, click on the name of the sub instruction that is to be modified.

The Edit Sub Instruction dialog box is displayed.

Enter or modify the following fields

Name The unique name of the instruction. Enter up to 50 characters for the name.

Display Text This text is displayed on the Handheld for the task. Enter up to 50 characters for the display text.

Description The text displayed when viewing more information on the Handheld for the task. Enter up to 900 characters for the description.

Type The instruction type is used to group instructions together and to select instructions for task profiles. Select a sub instruction type from the drop-down list.

Expected Duration The number of minutes expected to complete the instruction. Enter a number between 0 and 2147483647.

Skill Level The skill level used to denote if the instruction should only be completed by a user with a specific skill level. Select a skill level of “1” from the drop-down list. For a user to be presented the sub instruction they would have to have a skill level adequate to access the master instruction.

Response Type Determines what information the instruction will gather or what activity will be initiated by the instruction. The information could be entered when the task is initiated on the Handheld or a system value such as current user, component ID, or current date & time. An activity could create a work order or update the component's details. Select a response type from the drop-down list.

Sub instructions with a response type of *Create Work Order will create a work order during the completion of the task list. The name will default to the Display Text on the instruction and the user will be prompted for the Location, Type, Department, Area, Due Date, and Priority.

Choice List The response list if the response type is a choice list. Select a choice list from the drop-down list.

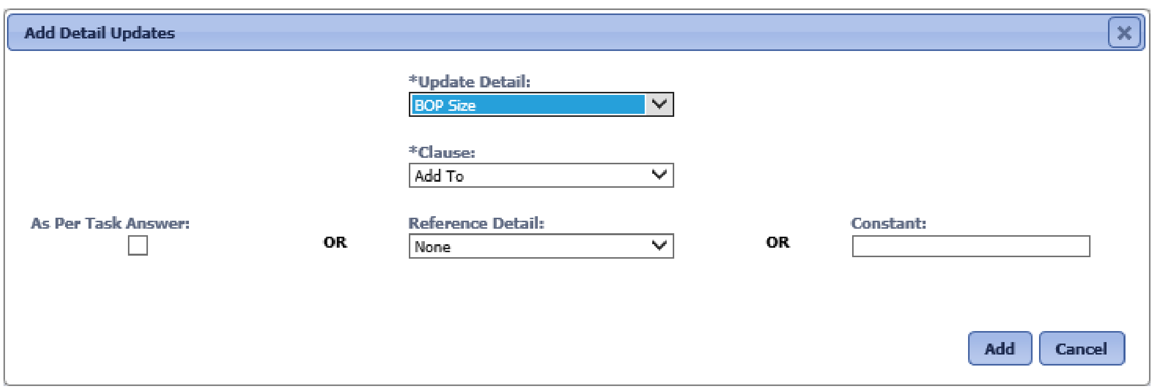
Units The units of measurement for the response. Enter up to 50 characters for the unit.

Image Allows an image to be attached to an instruction for display on the Handheld.

The Detail Updates pane is used to update component details. The detail can be updated with the answer to the instruction, the value of another detail, or a constant value. The detail is added to, subtracted from, or replaced, depending on the data type of the detail being updated.

Click the Add icon to the right of the Detail Updates

The Add Detail Updates dialog box is displayed.



Add Detail Updates dialog box

Update Detail The detail that is to be updated. Select a detail from the drop-down list.

Clause Determines the action that will be performed on the detail. Select a clause from the drop-down list.

Select one of the three options with which to update the detail.

As Per Task Answer The answer to the instruction will be used to update the detail. Click the checkbox to use the answer.

Reference Detail The value in this detail will be used to update the detail. Select a detail from the drop-down list.

Constant The value with which to update the detail. Keywords can be used here. See the Keywords section for more information about using keywords. Enter a value or keyword.

Click the Add button to save the Detail Update and return to the instruction or click the Cancel button to return to the instruction without making any changes.

Fields marked with an asterisk (*) are required to create a new sub instruction.

Click the Add button to save the sub instruction, the Save and Add Another button to add another sub instruction, or click Cancel to return to the previous page without saving the changes.

Task Assignments

Task Assignments (maintenance plans) define which instructions will be assigned to which component types.

Reviewing Task Assignments

From the Main Menu, select Admin -> Task Assignment.

The Task Assignment page appears.

Select a plan from the drop-down list.

To see the plan details, click the down arrow to the right of the name. Clicking the up arrow will collapse the details.

The name, type and the assigned component types will be displayed.

Click the tree icon to see the assignment hierarchy of the plan.

The Assignment Hierarchy dialog box is displayed.

Click the plus sign to the right of the plan to expand it and see the plan's groups.

Click the plus sign to the right of the group to expand it and see the group's instructions.

Click the plus sign to the right of the instructions to expand it and see the responses, sub instructions, or mandatory instructions.

Continue clicking the plus signs until the entire plan is expanded.

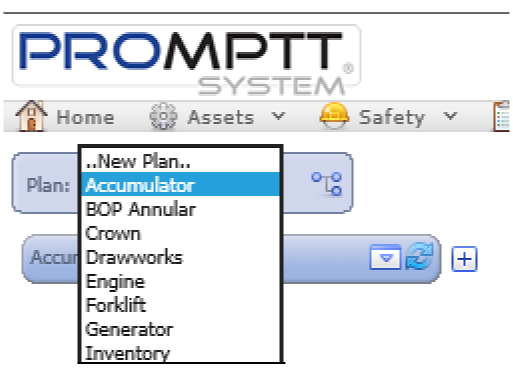
Creating and Modify a Task Assignment

From the Main Menu, select Admin -> Task Assignment.

The Task Assignment page appears.

Click on the drop-down list for plans.

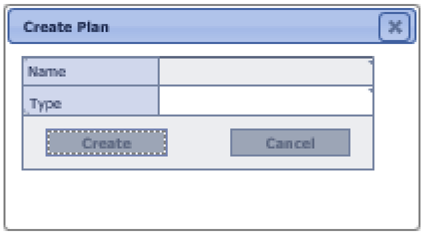
The Add Plan dialog box is displayed.



Add Plan dialog box

Select ..New Plan.. from plan drop-down list.

The Create Plan dialog box is displayed.



Create Plan dialog box

The plan is created using the inline editing feature. Click on the data cell for Name; enter up to 50 characters for the name and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

On the data cell for Type, select a type from the drop-down list and press the Tab or Enter key to save the change.

Click the Create button to create the plan and return to the Task Assignment page, or the Cancel button to return to the Task Assignment page without creating the plan.

After creating a new plan, click the plus sign to the right of the plan.

The Add Group button is displayed.

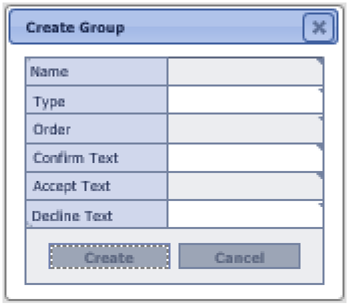
Click the Add Group button.

The Add dialog box is displayed with a list of existing groups.

Add dialog box

To create a new group, click the black create link at the top of the box

The Create Group dialog box is displayed.



Create Group dialog box

The group is created using inline editing. After entering a value in the data cell, pressing the Tab or Enter key will save the change. Clicking on another data cell instead of the Tab or Enter key will cancel the change.

Click on the data cell for **Name** and enter up to 50 characters for the name of the group.

On the data cell for **Type**, select a type from the drop-down list.

Click on the data cell for **Order** and enter a numeric value. This value is used to order the groups within the task list. Enter a whole number between 0 and 2147483647/

Click on the data cell for **Confirm Text** and enter up to 50 characters for the confirm text. The confirm text is displayed prior to executing the group in the task list.

Click on the data cell for **Accept Text** and enter up to 50 characters for the response to move forward in the group when completing the task list.

Click on the data cell for **Decline Text** and enter up to 50 characters for the response to decline continuing with the group when completing the task list.

Click the Create button to create the group and return to the Task Assignment page, or the Cancel button to return to the Task Assignment page without creating the group.

Click the Add Group button again.

The Add dialog box is displayed.

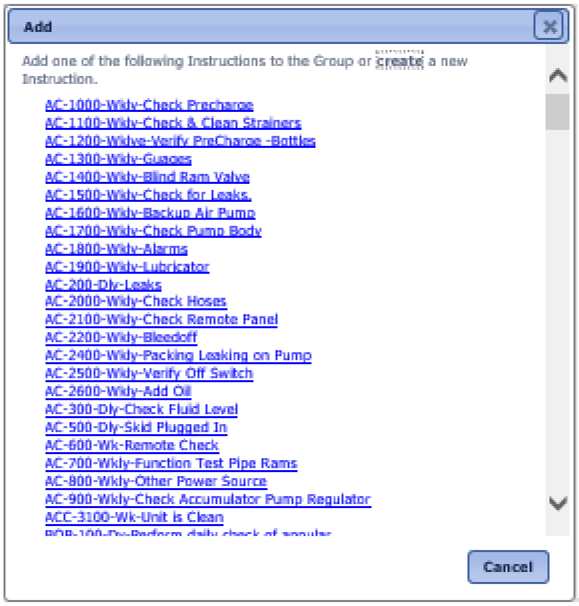
Click the name of the group that was just created to add it to the plan.

Click the plus sign to the right of the group.

Note: Groups are consistent from plan to plan. When a group is used in more than one plan, changing it in one plan will change it in all plans.

Click the Add Instruction button.

The Add dialog box is displayed with a list of master instructions.



Add dialog box

Click the blue link of the name of the master instruction to be added.

The instruction is added to the group.

Continue adding instructions until all the instructions have been added to the group.

To add a sub instruction to an instruction, click the plus sign to the right of the instruction.

The responses for the instruction will be listed.

Click on the plus sign to the right of the response to which the sub instruction is to be added. If the sub instruction should be asked regardless of the answer, click the Add Mandatory Instruction button.

Click the Add Sub Instruction button.

The Add dialog box is displayed with a list of sub instructions.

Click the blue link of the name of the sub instruction to be added.

Continue adding sub instructions until all the sub instructions have been added to the instruction.

Once an instruction or sub instruction has been built with sub instructions, any time the instruction or sub instruction is used, all the sub instructions below it will also be used. Changing the structure below an instruction or sub instruction in one task assignment will change the structure in all task assignments that use the instruction.

Instructions and sub instruction can be edited from the Task Assignment page. To edit an instruction, click the arrow to the right of the instruction name, the name, display text and type can be edited with inline editing. To edit additional fields of the instruction, click the blue Advanced Edit link.

The Edit Instruction dialog box will be displayed. The instruction can be modified and when the Save or Cancel button is clicked, the user will be returned to the Task Assignment page.

Note: Instructions and Sub instruction structures are consistent from plan to plan. When an instruction is used in more than one plan, changing it in one plan will change it in all plans.

Instructions and sub instructions can be created from the plan when needed.

To add an instruction from the task assignment, expand the group and click the Add Instruction button.

The Add dialog box is displayed.

Click the blue Create link

The Create Master Instruction dialog box is displayed.

Follow the instructions in Creating and Modifying Master Instructions.

The Plan is displayed with the new instruction added to the group

To add a sub instruction, expand the instruction, and expand the answer that will have the sub instruction added.

The Add dialog box is displayed.

Click the Create link

The Create Sub Instruction dialog box is displayed.

Follow the instructions in Creating and Modifying Sub-Instructions.

The Plan is displayed with the new sub instruction added to the group

Groups, instructions, and sub instructions can be deleted from a plan by click the Delete icon next to the name of the group, instruction, or sub instruction. This removes the assignment, but does not delete the object.

The Remove dialog box will be displayed. Click the OK button to remove the object, or click the Cancel button to return to the Task Assignment page without removing the object.

Task Profiles

Task Profiles determine the frequency of the task list generation, control the selection criteria for the instructions to be included in the task list, and generate the task lists when executed.

Reviewing a Task Profile

From the Main Menu, select Admin -> Task Profiles.

The Task Profile Search page appears.

Use one or more of the filters to determine which of the task profiles will be displayed. Leaving the filter blank will show all task profiles.

Select one or more types from the **Type** filter drop-down list.

Enter a name or a partial name of a task profile in the **Name** filter.

Enter a numeric value in the **Freq** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a numeric value in the **Expiry Time** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select one or more priorities from the **Priority** filter drop-down list.

Select one or more instruction types from the **Instruction Type** filter drop-down list.

Select one or more location types from the **Location Type** filter drop-down list.

Select one or more locations from the **Location** filter drop-down list.

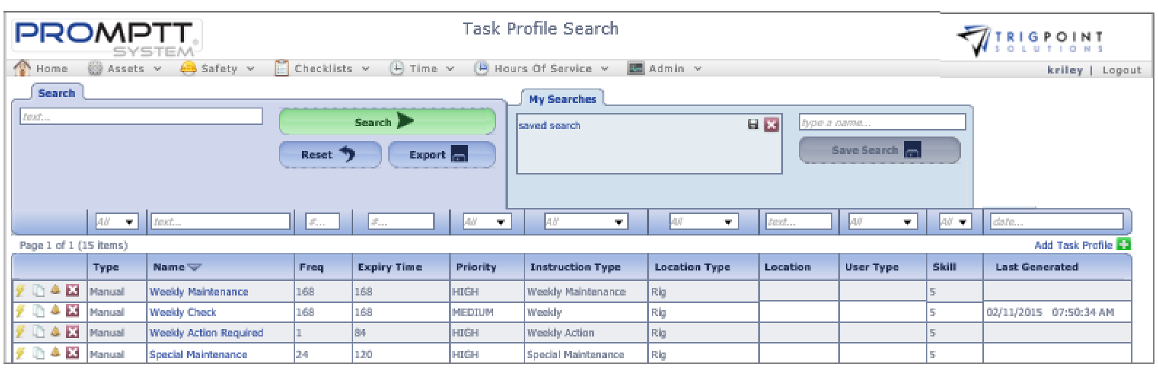
Select one or more user types from the **User Type** filter drop-down list.

Select one or more skills from the **Skill** filter drop-down list.

Check the radio button for Equal To, Before, or After and then select a date and time from the calendar in the **Last Generated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Task Profile Search page

Creating a task list from a profile is called executing the task profile. Task profiles that have the type set to “manual” can be executed by clicking on the lightning icon to the left of the task profile.

To delete a task profile that has not yet been used, click the on the Delete icon .

The Search Pages section contains additional information about search pages.

Creating and Modifying Task Profiles

From the Main Menu, select Admin -> Task Profiles.

The Task Profile Search page appears.

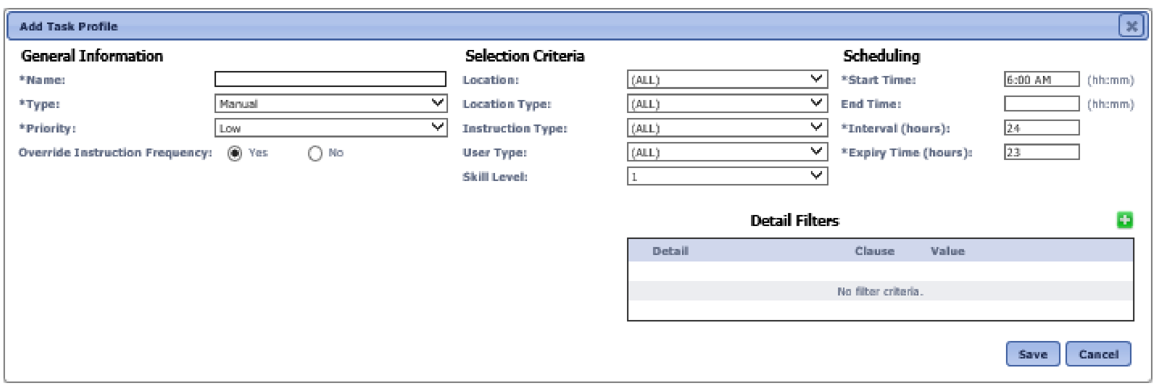
One or more of the filters can be used to limit the number of profiles: Name, Freq, Expiry time, Priority, Instruction Type, Location Type, Location, User Type, Skill, or Last Generated. Leaving the filters blank will select all profiles.

Click the Search button.

The search results are displayed.

To add a task profile, click the Add icon for Add Task Profile.

The Add Task Profile dialog box is displayed.



Add Task Profile dialog box

To modify an existing Task Profile, click on the name of the task profile.

The Edit Task Profile dialog box is displayed.

Enter or change the information for the task profile.

> **Name** The name that is displayed for the task list on both the Handheld and the website. Enter up to 50 characters for the name.
>
> **Type** The profile type determines how the profile is to be run. Select one of the following values from the drop-down list.
>
> > **Auto Run** This profile type automatically creates a task list when the start/end time, interval, and detail filter criteria are met.

Manual This profile type must be executed manually through the task profile summary screen to create a task list.

Regenerate This profile type will automatically create an Ad Hoc task list once the previous task list is complete for a location or completed for components within a location that have eligible instructions.

Test Run This profile type will create a test task list that will not synchronize to the Handheld and can be used for testing.

Priority The priority is used to denote the importance of the task list. Select High, Medium, or Low from the drop-down list. High priority profiles will be listed first on the handheld and displayed in red.

Override Instruction Frequency If this is set to “Yes”, it will override the specified frequency of the selected instructions.

Location Determines which location for which the task will be created. When location is set to “None”, a task list will be created for every location. If the field is left as All, then a task list will be created for all locations. Select a location from the drop-down list or leave as None.

Location Type Determines which location types for which the task will be created. When location type is set to “None”, a task list will be created for every location type. If the field is left as All, then a task list will be created for all location types. Select a location type from the drop-down list or leave as None.

Instruction Type This is used to filter instructions used for the task list; only instructions with the selected instruction type will be selected for the task list. If the field is left as All, then a task list will be created for all instruction types. Select an instruction type from the drop-down list or leave as All.

User Type This is used to filter instructions used for the task list; only instructions with the selected user type will be selected for the task list. If the field is left as All, then a task list will created for all user types. Select a user type from the drop-down list or leave as All.

Skill Level This is used to filter instructions used for the task list; only instructions that have a skill level the same or below the skill level will be selected for the task list. Select a skill level from the drop-down list.

Start Time Tasks can only be created after this time. Enter the time in HH:MM format.

End Time Tasks can only be created before this time. Optionally, enter the time in HH:MM format.

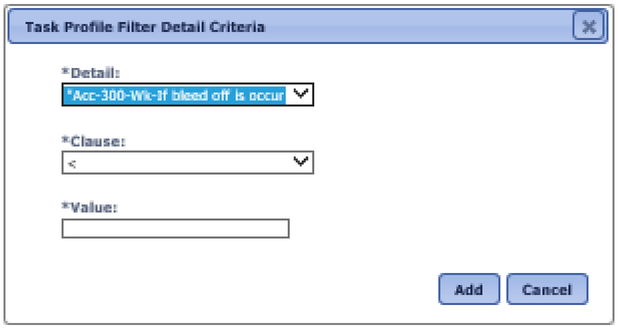
Interval Used to specify how often, in hours, the profile would be executed to create a task list. Enter a number between 0 and 2147483647.

Expiry Time Determines how long, in hours, after a task list is created that it will expire. Enter a number between 0 and 2147483647.

Detail Filters are used to limit the creation of a task list based on a specific component detail value.

To enter a Detail filter click the Add icon on the right-hand corner above the Details Filter pane.

The Task Profile Filter Detail Criteria dialog box is displayed.



Task Profile Filter Detail Criteria dialog box

Select a detail from the drop-down list.

Select a clause from the drop-down list.

Enter a value against which to compare the detail. A keyword may be used here in place of a value. See the Keywords section for more information on keywords.

Click the Add button to save the changes, or click the cancel button to return to the previous page without making any changes.

Click the Save button to save the changes, or click the Cancel button to return to the Task Profile Search page without making any changes.

Work Order Update Rules

The Work Order Update Rule creates an update to a location or component when the work order status is set to Approved in the system.

Reviewing Work Order Detail Updates

From the Main Menu, select Admin -> Work Order Update Rules.

The Work Order Detail Update Rules page appears.

Use one or more of the filters to determine which work order update rules are displayed. Leaving the filter blank will show all work order update rules.

Select either component or location, user, or all from the drop-down list of the **What to Update** filter.

Select one or more component types from the **Type** filter drop-down list.

Select one or more fields from the **Field to Update** filter drop-down list.

Enter a detail or partial detail in the **Update Detail** filter.

Select add, concatenate, deduct, or replace from the drop-down list of the **Clause** filter.

Select one or more source entry types from the **Source Entry Type** filter drop-down list.

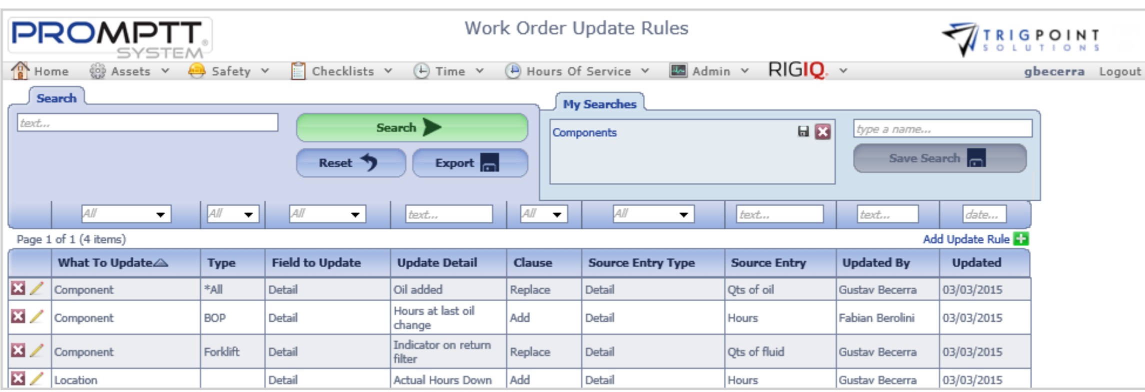
Enter a source entry or partial source entry in the **Source Entry** filter.

Enter a name or a partial name of a task profile in the **Update By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Work Order Update Rules page

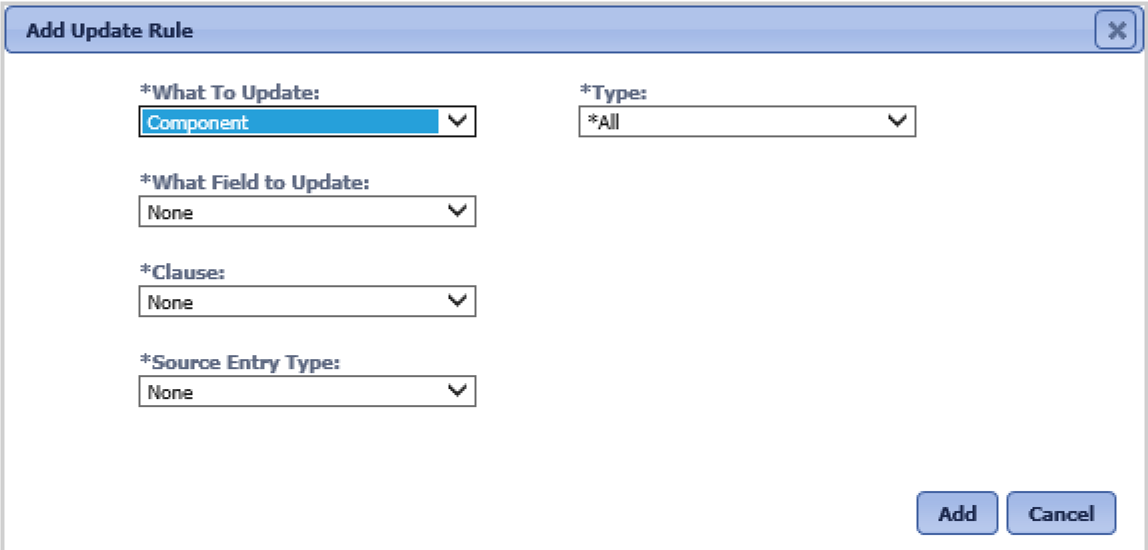
To delete a work order update rule, click the Delete icon . Only rules that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Work Order Update Rules

From the Work Order Update Rules page, click the Add icon for Add Update Rule to add a rule.

The Add Update Rule dialog box is displayed.



Add Detail Update Rule dialog box

To modify a Work Order Update Rule, on the Work Order Update Rules page, click the Pencil icon to the left of the rule.

The Edit Update Rule dialog box will be displayed.

Enter or modify the values in the following fields as needed.

What to Update The entity to which the update will be assigned. Select component or location from the drop-down list.

Type The type of component to which the rule will be applied. This field will only be displayed if component is selected for the What to Update field. Select a type from the drop-down list.

What Field to Update The field that will be updated when the work order is approved. Select a field from the drop-down list.

Update Detail The entity detail that will be updated. This field will only be displayed if Detail is selected for the What Field to Update field. Select a detail from the drop-down list.

Clause The action that will be performed for the update. Select Add, Concatenate, Deduct, or Replace from the drop-down list. Add and deduct can only be used with numeric details. Date details can only be replaced. Select a clause from the drop-down list.

Source Entry Type The value with which to update the entity. Select one from the drop-down list.

Approved By The username that approved the work order will be used to update the entity.

Approved Date Time The date that the work order was approved will be used to update the entity.

Area The work order area will be used to update the entity.

Assigned To The user name that is assigned to the work order will be used to update the entity.

Completed By The user name that completed the work order will be used to update the entity.

Completed Date Time the date that the work order was completed will be used to update the entity.

Constant The value that will be used to update the entity. Keywords can be used here. See the Keywords section for more information about keywords. Enter a value or a keyword.

Department The work order department will be used to update the entity.

Description The work order description will be used to update the entity.

Detail A detail on the work order will be used to update the entity.

Location The work order location will be used to update the entity.

Priority The work order priority will be used to update the entity.

Reference Detail Use another detail to update the entity. A component detail can only be updated by another component detail; a location detail can only be updated by another location detail.

Type The work order type will be used to update the entity.

Work Order Detail The detail from the work order with which to update the entity. This field will only be displayed when the Source Entry Type field is set to Detail. Select a value from the drop-down list.

Reference Detail The component or location detail with which to update the entity. This field will only be displayed when the Source Entry Type field is set to Reference Detail. Select a value from the drop-down list.

Constant The value that will be used to update the entity. This field will only be displayed when the Source Entry Type field is set to Constant. Enter an alphanumeric value, of up to 900 characters. Only the characters that will fit in the target field will be used to update the target field, regardless of what is entered in the constant.

All of the fields are required to create a rule.

When modifying a rule, use the Save button to save any changes. Use the Cancel button to return to the Work Order Detail Update Rules page without saving any changes.

When creating a new rule, once all of the fields have been answered, click the Add button to save the Update Rule and return to the Work Order Update Rules page, or click the Close button to close the dialog box without saving.

Checklist Templates

The Checklist Template option in the Admin section of the menu allows the setup of checklists. Checklists are used for on-demand inspections. Checklist templates can only be added and maintained on the PROMPTT® website.

Reviewing Checklist Templates

From the Main Menu, select Admin -> Checklist Templates.

The Checklist Templates page is displayed.

Use one or more of the filters to determine which of the templates will be displayed. Leaving the filter blank will show all templates.

Enter a name or a partial name of a checklist template in the **Name** filter.

Enter a description or partial description of a checklist template in the **Description** filter.

Enter a reference or part of a reference of a checklist template in the **Reference** filter.

Select one or more categories from the **Category** filter drop-down list.

Select active or inactive from the **Active** filter drop-down list.

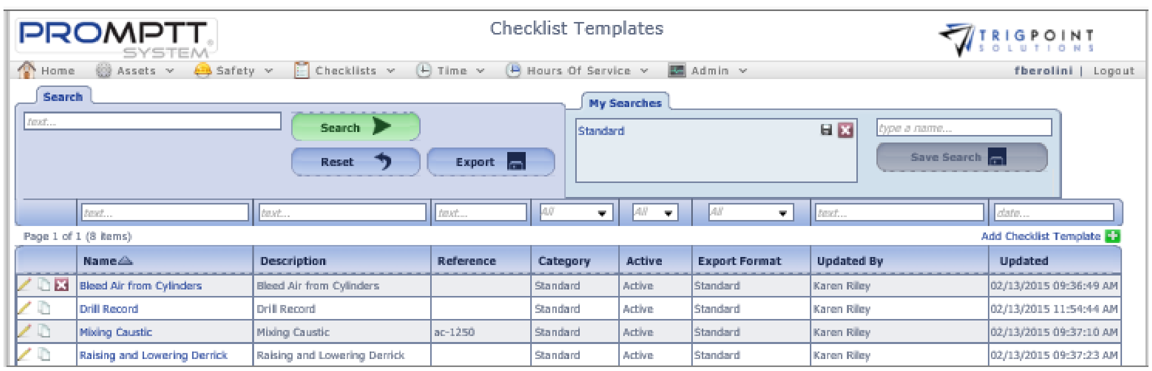
Select one or more export formats from the **Export Format** filter drop-down list.

Enter a name or a partial name of a user in the **Updated By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button to display the results of the search.

The results of the search are displayed.



Checklist Templates page

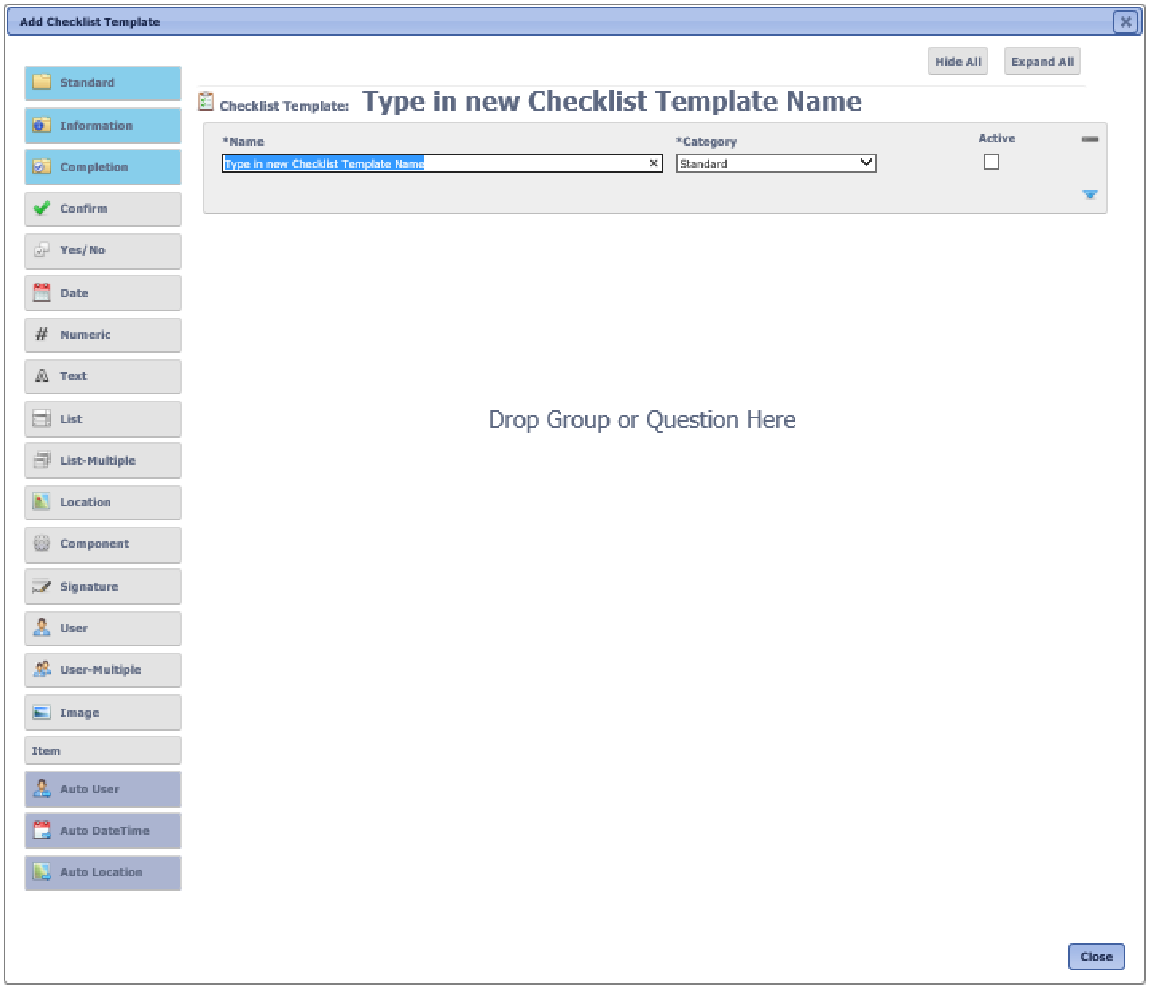
To delete a checklist template, click the Delete icon. Only templates that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Checklist Template

From Checklist Template page, click the Add icon for Add Checklist Template to create a new checklist, or click the checklist name link to modify a checklist.

The Add Checklist Template dialog box is displayed.

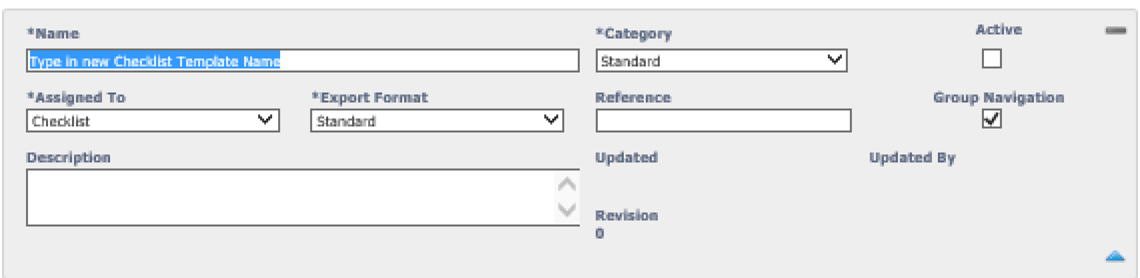


Add Checklist Template dialog box

Click on the Pencil icon to the right of the checklist to change an existing checklist.

The Checklist Template dialog box is displayed.

To expand the checklist header information, click on the Down Chevron icon . To hide the additional information click the Up Chevron icon .



Header Information after Using Blue Arrow

Enter or modify the following information.

Name The name used to identify the checklist in the system. Enter up to 100 characters for the name.

Category Used to group checklists together. Select a category from the drop-down list.

Active Indicates if the checklist is currently active in the system. If a checklist is marked as inactive, it will not transmit to the handheld devices. Check the active box to mark the checklist as active.

Assigned To Determines where the checklist will be used. Select JSA or Checklist from the drop-down list.

Export Format The format to which the checklist will be exported. Select a format from the drop-down list. If a custom format is required, contact the TrigPoint Solutions Support Office.

Reference A user-defined field to sort and select checklists. Enter up to 100 characters for the reference.

Group Navigation When Group Navigation is checked, it allows the handheld user to answer groups outside of sequential order. Leaving the box unchecked will force the user to answer the checklist questions in order.

Description This field is used to describe the checklist. It is informational only and will not be displayed on the handheld. Enter up to 200 characters for the description.

Updated By System-generated field showing the last user that updated the checklist template.

Updated System-generated field showing the last date and time that this checklist template was updated.

Revision System-generated field. This number will be incremented by one every time a change is made to the checklist.

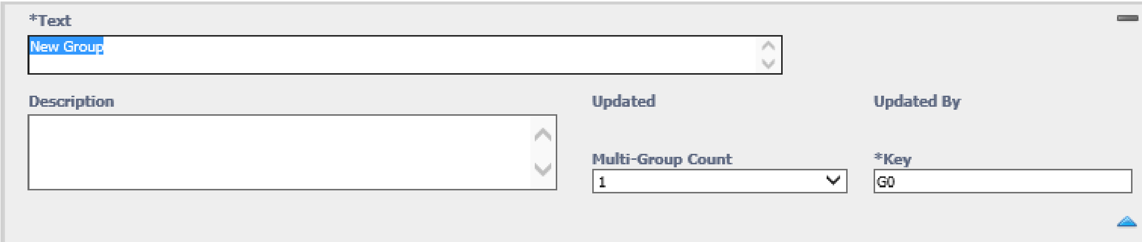
Groups are used to bundle checklist questions together. All checklists will have a minimum of one group.

The three types of groups are

- Standard – Use for regular checklist groups
- Information – Use for informational only groups. The group text and description are displayed during checklist execution, but no questions can be added to the group.

- Completion – Use for completion groups. Only one completion group can be added to a checklist template.

To add a group to the checklist, the user drags and drops one of the three types from the left-hand box to the **Drop Group or Question Here** on the main pane. To see the detail information for the group, click the blue down arrow. To hide the detail, click the blue up arrow.



Group Information after Using Blue Arrow

Once the group has been added to the checklist, enter or modify the following fields as needed.

Text The name used to identify the group in the system. The text will be displayed when a user is answering a checklist on the handheld. Enter up to 20 characters for the text.

Description This field is used to describe the group. It is informational only and will not be displayed on the handheld. Enter up to 300 characters for the description.

Multi-Group Count Determines how many times the questions in the group will be answered. Select a value from the drop-down list. Selecting Unlimited will allow the user performing the checklist to add the group as many times as necessary to the checklist.

Dependencies and update rules may be defined within a group based on another question within the same group or outside the group only if the outside group's multi-group is set to 1. Rules defined within the same group would only apply to that specific instance of that group.

If any of the questions in the group are mandatory, then the mandatory questions in the group must be answered the specified number of times to which the Multi-group field is set. When the Multi group field is set to Unlimited, then the mandatory questions in the group must be answered at least once.

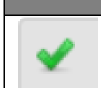
Only Standard groups will prompt for the multi-group value.

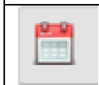
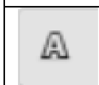
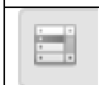
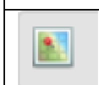
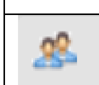
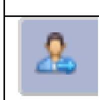
Key This is a system generated value.

Updated System-generated field showing that last date and time that this group was updated.

Updated By System-generated field showing the last user who updated this group.

A checklist group consists of one or more types of questions. There are 16 types of questions. They will prompt the user with a user-defined question and each type has a unique method for answering.

Icon	Type	Answer
	Confirm	An OK button

	Yes/No	A Yes button and a No button
	Date	Calendar
	Numeric	A text box that will only accept numeric values
	Text	A text box that will accept alphanumeric values
	List	A drop-down list that will accept one answer
	List-Multiple	A drop-down list that will accept multiple answers
	Location	A drop-down list of parent locations
	Component	A drop-down list of components
	Signature	A signature box
	User	A drop-down list of users that will accept one answer
	User Multiple	A drop-down list of users that will accept multiple answers
	Image	On the Handheld and PC/Tablet application, will prompt the user to take a picture with the camera. On the web, will prompt the user to upload or select an image. The resulting image will be attached to the checklist answer.
	Auto User	There will be no question asked; the answer will default to the user answering the checklist. Non-editable

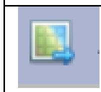
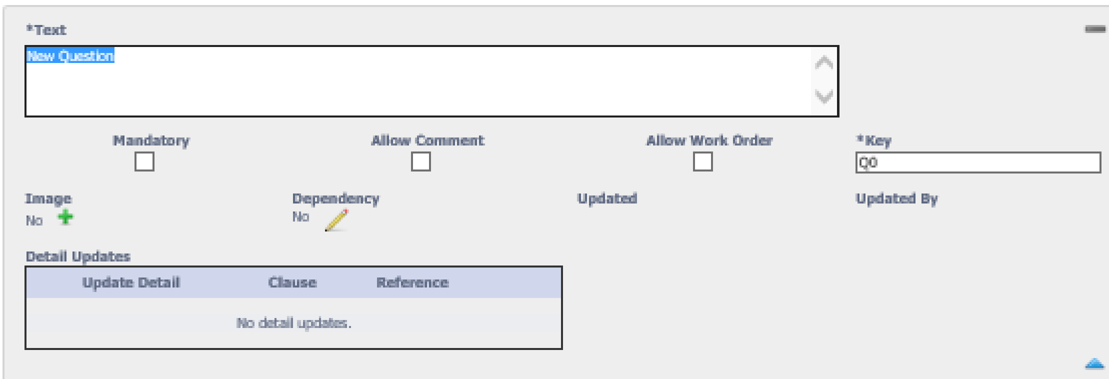
	Auto Date Time	There will be no question asked; the answer will default to the current date and time. Non-editable
	Auto Location	There will be no question asked; the answer will default to the handheld location. Non-editable

Table 2 - Checklist Question Types

A question type can be used more than once in a checklist. After creating the group, add a question by dragging and dropping the question type to the group to which it should be assigned. To see the detail information for the question, click the blue down arrow. To hide the detail information, click blue up arrow.



Question Information after Using Blue Arrow

Once the question has been added to the checklist, enter or modify the following fields as needed.

Text The question as it will be displayed on the handheld. Enter up to 900 characters for the text.

Mandatory Determines if the user can continue and complete the checklist without answering the question. Click the checkbox to mark the question as being mandatory.

Allow Comment Determines if the user can add a comment on the Handheld after answering the question. When this is answered “Yes”, the comment icon will be displayed and enabled when the question is active on the Handheld.

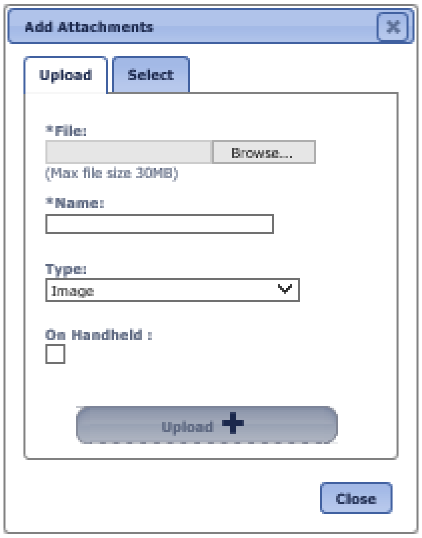
Allow Work Order Determines if the user can add a Work Order from the checklist. When this is answered “Yes”, the work order icon will be displayed and enabled when the question is active on the Handheld.

Key This is a system generated value.

Image Allows an image to be attached to the question, the image will be shown with the question on the Handheld.

To add an image, click the Add icon  under the Image field.

The Add Attachments dialog box is displayed.



Add Attachments dialog box

To upload a new attachment, click the Upload tab.

Click the Browse button to select the file to attach.

Enter the Name and select the type of attachment.

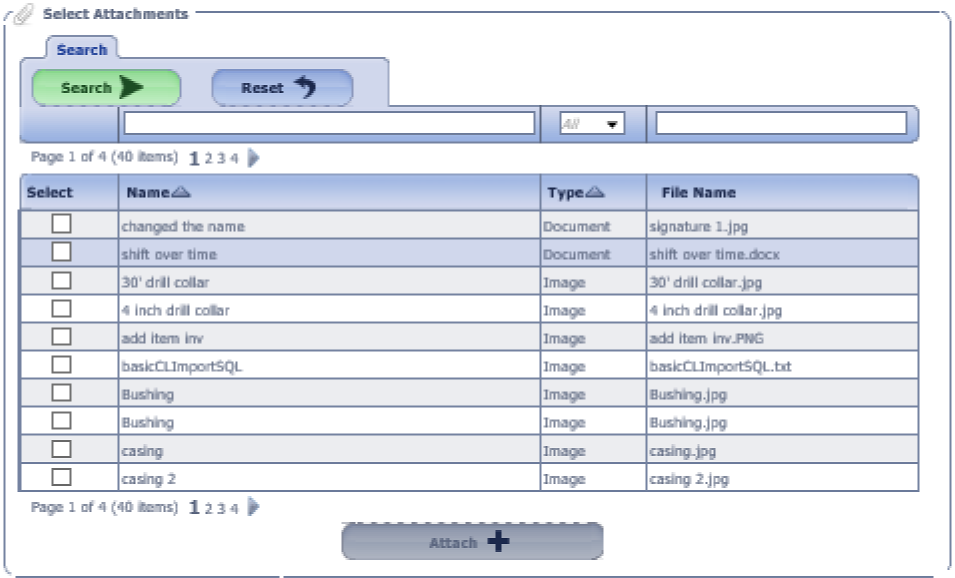
If the attachment is an image that is to be synchronized to the Handheld, click the On Handheld box.

Click the Upload button. Click the Browse button to add another attachment or click the Close button to return to the Attachments tab.

The attachment is now added to the question.

To add an existing image, click the Select tab.

The Select Attachments dialog box is displayed with a list of attachments.



Add Attachments – Select dialog box

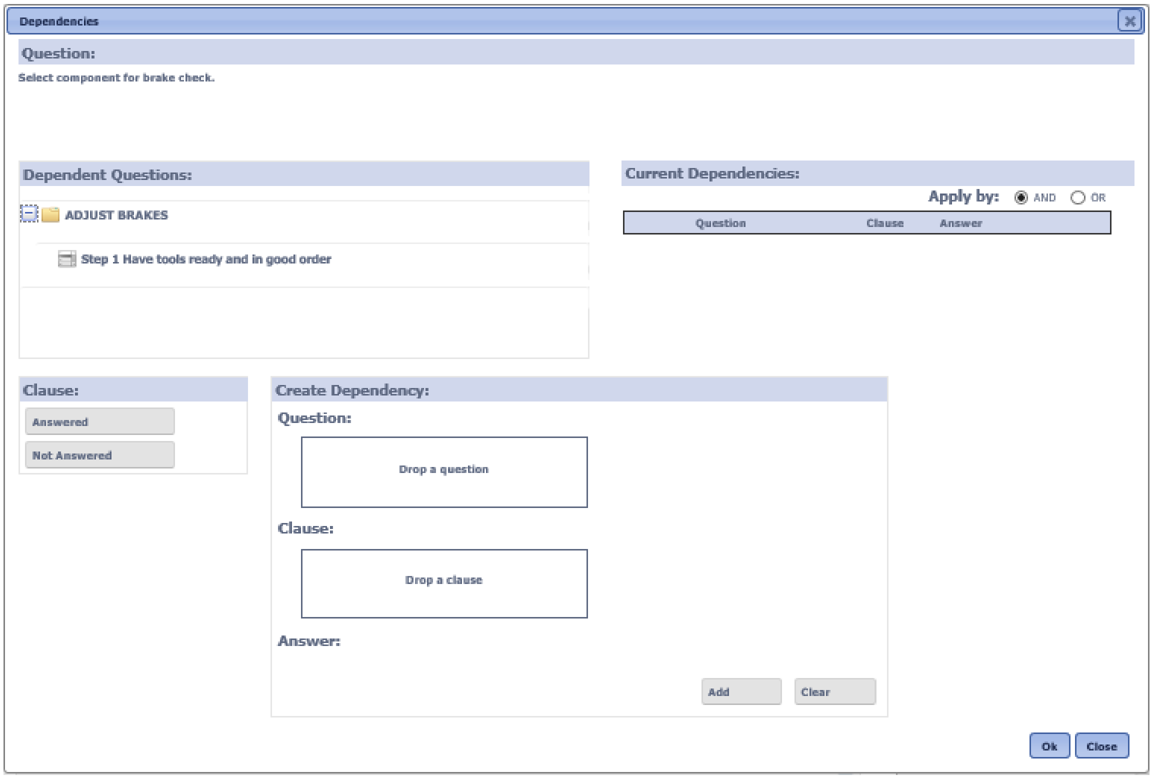
Use one or more of the following filters to determine the attachments to be displayed: Name, Type, or Filename. Leaving the filters blank will display all attachments.

Click the Select box for the attachments on the page that are to be added to the checklist, and click the Attach button. Each page of attachments must be entered separately. Once all of the attachments are added, click the Close button to return to the Attachments tab.

The attachment is now added to the checklist.

Dependency Dependencies are used to determine if a checklist question should be asked or not, dependent on the answer to a previous question. To add a dependency, click on the Pencil icon below the Dependency label.

The Dependencies dialog box will be displayed.



Dependencies dialog box

Drag and drop the question from the Dependent Questions panel to the Drop A Question box. This will be the question upon which the current question is dependent.

Drag and drop one of the Clauses to the Drop a Clause box. These will vary depending on the type of question that it is dependent.

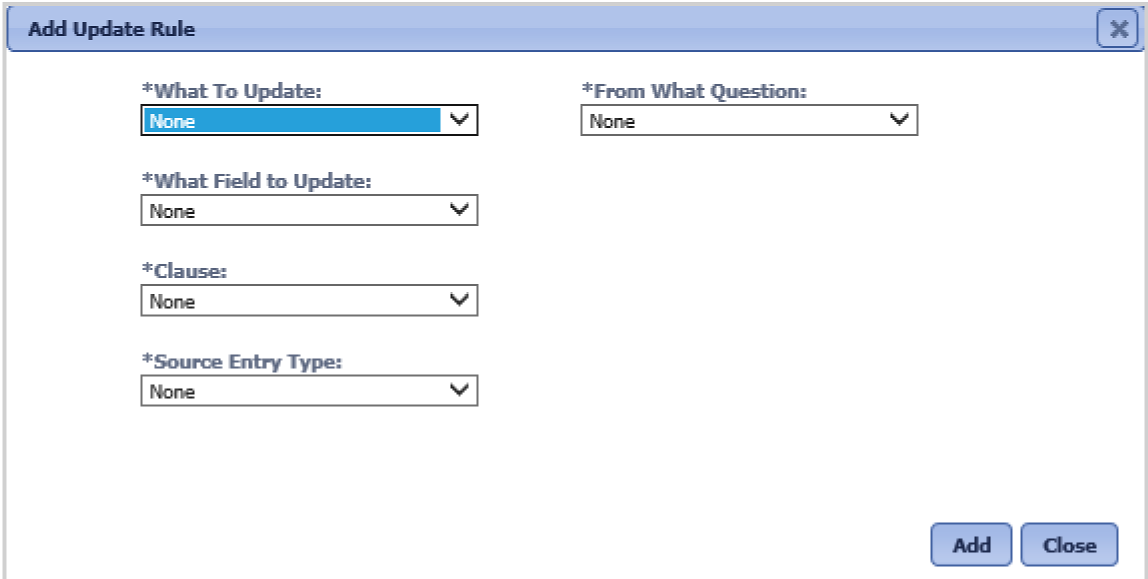
Once a clause is dragged and dropped, the Answer will display the valid answers to the question. Select an answer and then click the Add button to save the dependency.

If more than one dependency is used, select an Apply By. If both the questions should be true for the question to be asked, mark the radio button by AND. If only one of the questions needs to be true for the question to be asked, mark the radio button by OR.

Select the OK button to save the dependencies. Select the Close button to close the Dependencies dialog box without saving.

Detail Updates The Detail Update creates an update to a Location detail or a Component detail when the checklist question is answered on the handheld. To add a Checklist Detail Update, click the Add icon above the Detail Updates pane. The Add icon will only be displayed if there are corresponding questions upon which to base the update.

The Detail Update Rule dialog box is displayed.



Add Detail Update Rule dialog box

What to Update The entity to which the update will be assigned. Select component or location from the drop-down list. The component and location selections will only be displayed if there are corresponding questions upon which to base the update.

From What Question The question whose response will be the component or location to be updated. Select a question from the drop-down list.

What Field to Update The field that will be updated when the checklist is completed. Select a field from the drop-down list.

Clause The action that will be performed for the update. Select Add, Concatenate, Deduct, or Replace from the drop-down list. Add and deduct can only be used with numeric details. Date details can only be replaced. Select a clause from the drop-down list.

Source Entry Type The value with which to update the entity. Select one from the drop-down list.

> **Approved By** Reserved for future use.
>
> **As Per Answer** The answer to the question will be used to update the entity.
>
> **Constant** The value that will be used to update the entity. Keywords can be used here. See the Keywords section for more information about keywords. Enter a value or a keyword.
>
> **End Date Time** The date and time that the checklist was completed will be used to update the entity.
>
> **Leader** The leader of the checklist will be used to update the entity.
>
> **Location** The checklist location will be used to update the entity.

Reference Detail Use another detail to update the entity. A component detail can only be updated by another component detail; a location detail can only be updated by another location detail.

Revision The checklist revision will be used to update the entity.

Start Date Time The date and time that the checklist was started will be used to update the entity.

Type The checklist type will be used to update the entity.

Version The checklist version number will be used to update the entity.

Work Order Detail The detail from the work order with which to update the entity. This field will only be displayed when the Source Entry Type field is set to Detail. Select a value from the drop-down list.

Reference Detail The component or location detail with which to update the entity. This field will only be displayed when the Source Entry Type field is set to Reference Detail. Select a value from the drop-down list.

Constant The value that will be used to update the entity. This field will only be displayed when the Source Entry Type field is set to Constant. Enter an alphanumeric value, of up to 900 characters. Only the characters that will fit in the target field will be used to update the target field, regardless of what is entered in the constant.

All of the fields are required to add a detail update. Once all of the fields have been answered, click the Add button to save the Detail Update Rule and return to the Checklist Detail dialog box, or click the Close button to close the Add Detail Update Rule dialog box without saving.

The Hide All button at the top of the page will contract all of the groups that are currently expanded so that only the group names are displayed.

The Expand All button at the top of the page will expand all of the groups. Use the plus sign to the right of the group to expand an individual group.

The dependent upon icon to the right of a question will highlight any questions that depend on the question. This icon can only be used for a single question at a time.

The dependency icon to right of a question will highlight any dependent questions. This icon can only be used for a single question at a time.

The Preview button allows the user to preview the checklist, as it will appear on the handheld. None of the answers given in the Preview mode are saved to the system.

Click the Preview button.

The Preview dialog box is displayed.

Initial Preview dialog box with Group Navigation

If the Group Navigation is set to “Yes”, then a list of groups will be displayed as in the above dialog box. If the Group Navigation is set to “No”, then the first question in the first group will be displayed.

Click on the group to bring up the first question in the group.

The Preview dialog box is displayed with the first question of the group shown.

Preview dialog box with first question

Click the comment icon to enter a comment about the question.

Click the work order icon to enter a work order.

If this is a mandatory question, click the answer to the question to move to the next question. If this is not a mandatory question, then clicking the right arrow will move to the next question.

Click the left arrow to move to the previous question.

Click the Sections button to return to the Group screen.

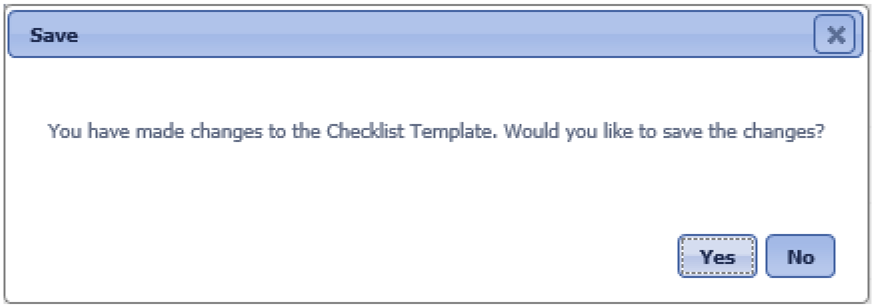
Click the Refresh button to the first question in the group to return to the initial entry screen and clear any previous answers.

Click the Close button to close the Preview dialog box and return to the Checklist Template dialog box.

Click the Save button to save the changes made to the checklist.

Click the Close button in the lower right-hand corner of the Checklist Template dialog box to close the dialog box and return to the Checklist Templates page.

If any changes to the checklist had not been previously saved prior to clicking the Close button, the system will prompt to save the checklist before closing.



Save dialog box

Click the Yes button to save the changes before closing the Checklist Template dialog box, or click the No button to return to the Checklist Templates page without saving the changes.

Translations

Translations allows for the entry of different language text, or just different text, for certain text fields used throughout the system. The text displayed is based on the signed in user's selected language.

Reviewing and Modifying Translations

From the Main Menu, select Admin -> Translation Editor.

The Translations Editor page is displayed.

To show untranslated resources only, click the checkbox for Show Untranslated only.

Use one or more of the filters to determine which of the translations will be displayed. Leaving the filter blank will show all translations.

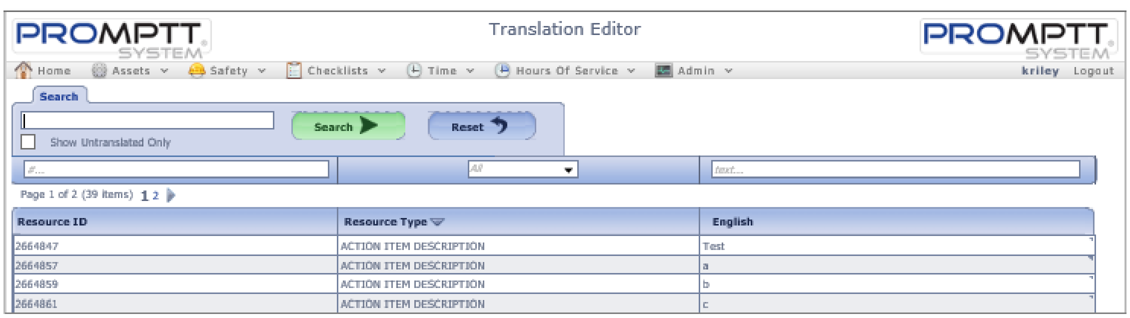
Enter a numeric resource ID or a partial resource ID in the Resource **ID** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select one or more resource types from the **Resource Type** filter drop-down list.

Enter a translation or a partial translation in the **English** filter.

Click the Search button

The results of the search are displayed.



Translation Editor page

The translations can be edited using inline editing. Click on the data cell in the English column that is to be changed and enter the new value and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

For systems that are being maintained with two or more languages, there will be a separate column for each language. Any of the fields that are to be translated for the additional language will need to have the translation entered into the Translation Editor.

The Search Pages section contains additional information about search pages.

Setting up Locations

The location admin section allows the set-up of locations and associated information.

- **Location Types** Used to select locations and to group locations together for reporting purposes. Location templates are usually set up by location type.
- **Location Statuses** Denotes the physical or operational status of a location. Tasks will only be generated for active status locations.
- **Location Choice Lists** Provides consistent information for the location details. If a list is used for a location detail, it is presented as a drop-down list for selection.
- **Location Detail Definitions** A flexible list of all the possible details for a location. Locations can have a different set of details based on the type of location. Examples of common details are division, state, or rig down date.
- **Location Templates** Used to create locations types in a consistent manner. The template contains the details for that type of location. The details in the template can be mandatory or optional and are presented in the order specified in the template.
- Create **Locations** Locations are created with the use of templates. The template is selected for the type of location to be created and the details are then displayed for entry. Any blind detail defaults are added behind the scenes and any other default values are pre-entered on the screen. The details are displayed on the screen in the order specified in the selected template. Locations can only be created on the website.

The following diagram outlines how data flows when creating/modifying Location information. Hover over a box to see what topic it refers to and click the box to view that topic.

Activity

Using the diagram, create a template and the data needed to create the template.

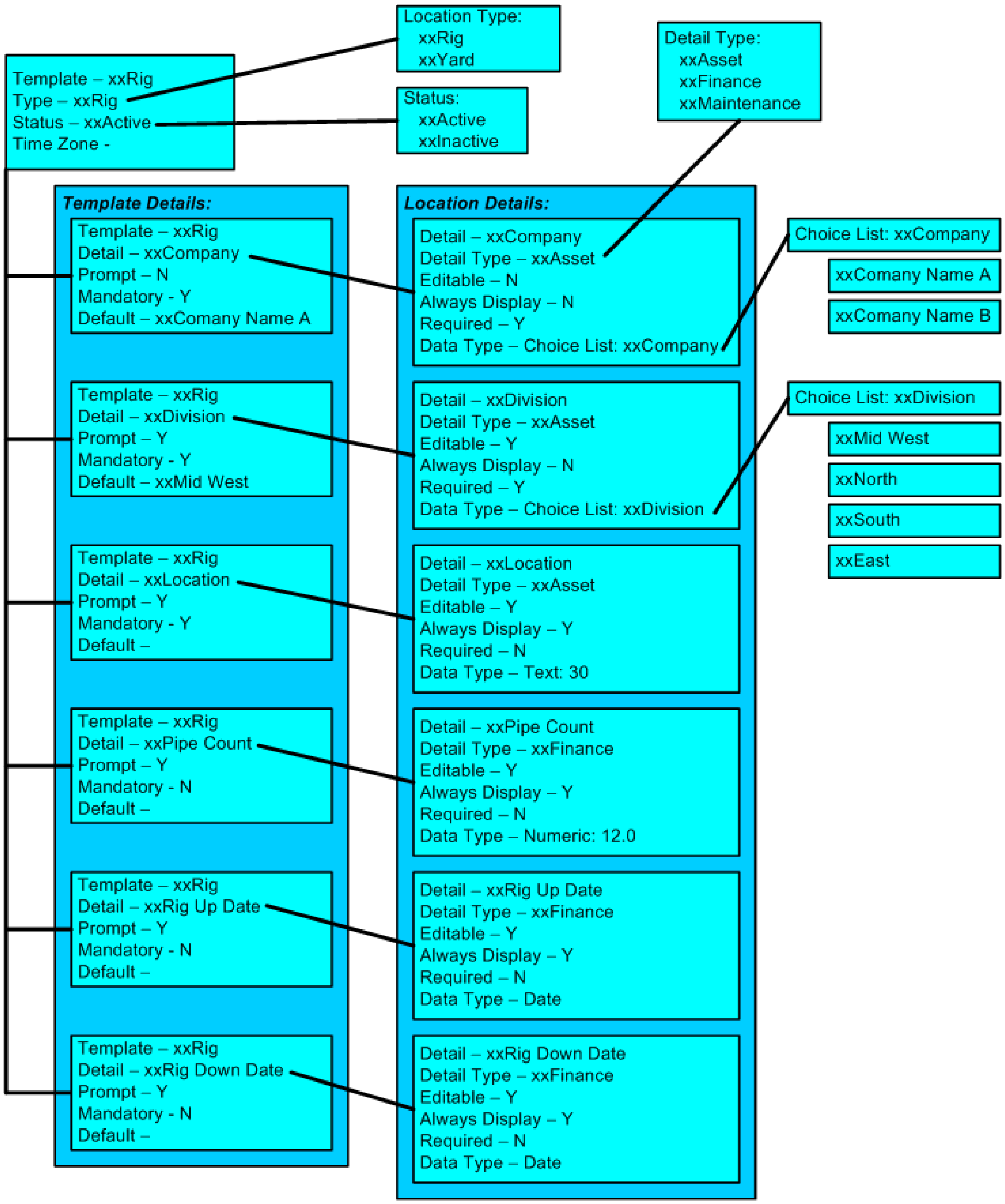


Figure 1- Location Data Flow

Viewing Location Data Type

Location Data Types are used to determine the type of data a location detail definition can store. They come preloaded in the system and the user can only view them. Location Data Types can be viewed in the primary lists.

From the Main Menu, select Admin -> Primary Lists.

The Primary Lists page is displayed.

Select Location Data Types in the Type drop-down list.

Primary Lists page – Location Data Type

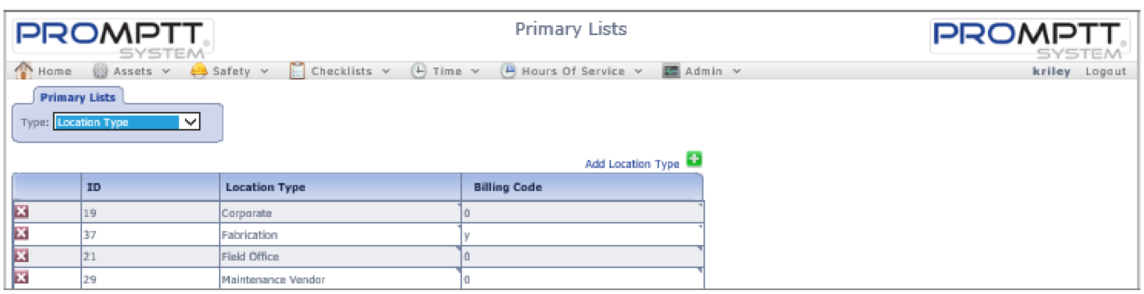
Creating and Modifying a Location Type

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Location Type from the Type drop-down list.

A list of location types is displayed.

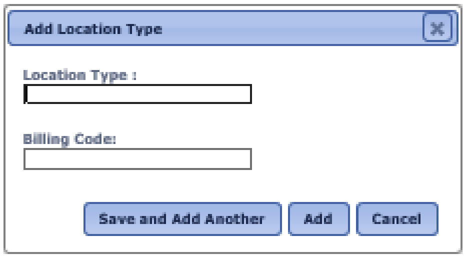


Primary List page - Location Type

The existing location types can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be changed. Click on the data cell that is to be changed, enter the new text and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new location type, click the Add icon for Add Location Type.

The Add Location Type dialog box is displayed.



Add Location Type dialog box

Enter a Location Type of up to 50 characters.

Enter a Billing Code of up to 50 characters.

Click the Save and Add Another button to save the type and add another location type, click the Add button to save the type and return to the Primary List page or click the Cancel button without saving the type and return to the Primary List page.

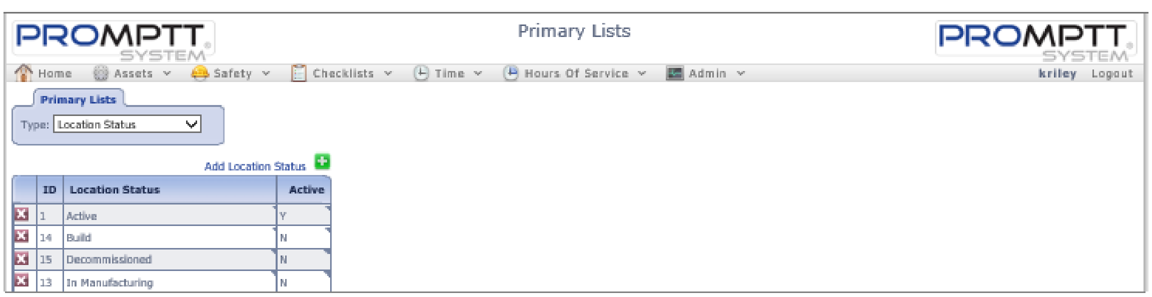
Creating and Modifying a Location Status

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Location Status from the Type drop-down list.

A list of location statuses is displayed.

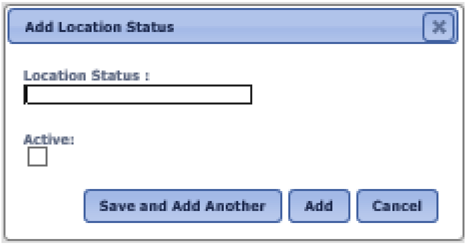


Primary List page with Location Status

The existing location statuses can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be edited. Click on the data cell that is to be changed, enter the new text and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new location status, click the the Add icon for Add Location Status.

The Add Location Status dialog box is displayed.



Add Location Status dialog box

Enter a Location Status of up to 50 characters.

Click the Save and Add Another button to save the status and add another location status, click the Add button to save the status and return to the Primary List page, or click the Cancel button without saving the status and return to the Primary List page.

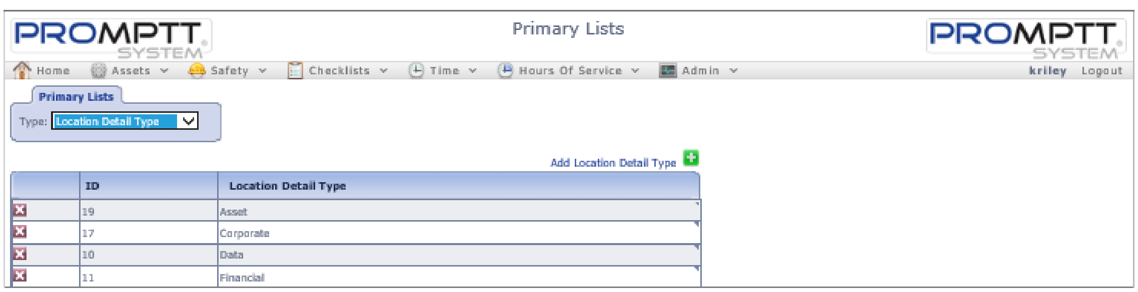
Creating and Modifying a Location Detail Type

From the Main Menu, select Admin -> Primary Lists

The Primary List page is displayed.

Select Location Detail Type from the Type drop-down list.

A list of location detail types is displayed.

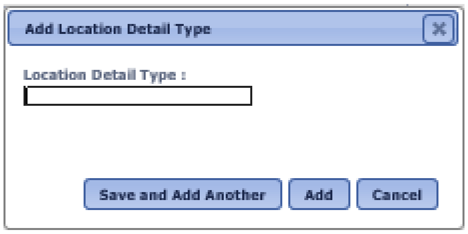


Primary List page - Location Status

The existing location detail types can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be edited. Click on the data cell that is to be changed, enter the new text and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new location detail type, click the the Add icon for Add Location Detail Type.

The Add Location Detail Type dialog box is displayed.



Add Location Detail Type dialog box

Enter a Location Detail Type of up to 50 characters.

Click the Save and Add Another button to save the detail type and add another location detail type, click the Add button to save the detail type and return to the Primary List page or click the Cancel button without saving the detail type and return to the Primary List page.

Location Choices

Creating and Modifying Location Choices

From the Main Menu, select Admin -> Location Choices.

The Location Choices page is displayed.

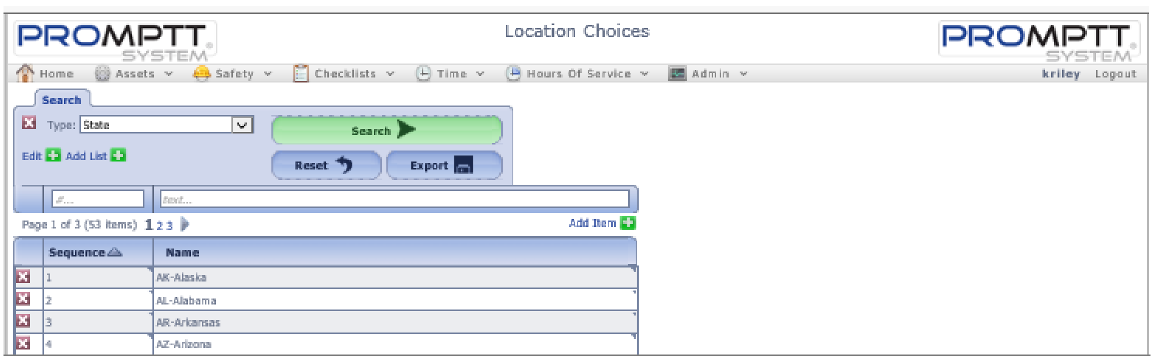
Select a location choice from the Type filter.

Use one or more of the filters to determine which of the choice list elements will be displayed. Leaving the filter blank will show all elements.

> Enter a numeric value in the **Sequence** filter. The less than, greater than or equals symbol can be used immediately preceding the value.
>
> Enter a name or a partial name of a choice list in the **Name** filter.

Click the Search button.

The results of the search are displayed.

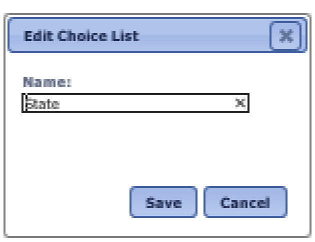


Location Choices page

To delete a choice list, click the Delete icon next to the Type field . Only lists that have not been used may be deleted.

To modify the name of the choice list, click the for Edit.

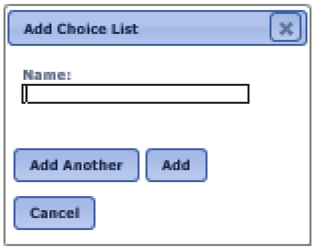
The Edit Choice List dialog box is displayed.



Edit Choice List dialog box

To add a new choice list click the Add icon for Add List.

The Add Choice List dialog box is displayed.



Add Choice List dialog

Enter or change the Name of the choice list. The Name can have up to 50 characters.

Click the Add Another button to save the changes and add another, click the Add button to save the changes and return to the Primary List page, or click the Cancel button without saving the changes and return to the Primary List page.

To modify the elements of a choice list

Select the choice list to edit in the Type filter.

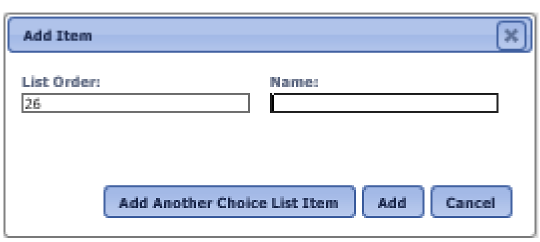
The existing location choice lists elements that can be edited using inline editing. Data cells with a triangle in the upper right-hand corner may be edited. Click on the data cell that is to be changed, enter the new value or select a value from the drop-down list, and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To add an element to a choice list

Select the choice list to edit from the drop-down list for Type.

Click the Add icon for Add Item in the upper right-hand corner.

The Add Item dialog box is displayed.



Add Item dialog box

Enter the list order. Enter a numeric value.

Enter the name of the element. Enter up to 50 characters.

Click the Add Another Choice List Item button to save the element and add another, click the Add button to save the element and return to the Location Choices page, or click the Cancel button without saving the element and return to the Location Choices page.

To delete a choice list element, click the Delete icon to the left of the element. Only elements that have not been used may be deleted.

Location Detail Definitions

Reviewing a Location Detail Definition

From the Main Menu, select Admin -> Location Detail Definitions.

The Location Detail Definitions page is displayed.

Use one or more of the filters to determine which of the detail definitions will be displayed. Leaving the filter blank will show all detail definitions.

Select one or more detail types from the **Detail Type** filter drop-down list.

Enter a name or a partial name of a detail definition in the **Name** filter.

Select Y, N, or All from the **Edit** filter.

Select Y, N, or All from the **Disp** filter.

Select Y, N, or All from the **Reqd** filter.

Select one or more data types from the **Data Type** filter drop-down list.

Select one or more choice lists from the **Choice List** filter drop-down list.

Select one or more functions from the **Function** filter drop-down list.

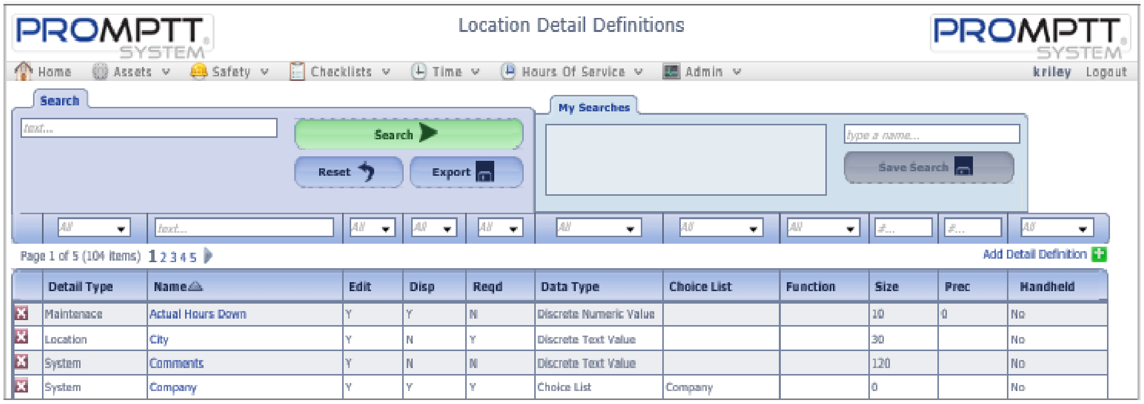
Enter a numeric value in the **Size** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a numeric value for the precision in the **Prec** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select Y, N, or All from the **Handheld** filter.

Click the Search button.

The search results are displayed.



Location Detail Definitions page

To delete a detail definition, click the Delete icon .

The Remove dialog box will be displayed.

Click the OK button to delete the detail, or click the Cancel button to return to the Location Detail Definitions page without deleting the detail.

Only detail definitions that are not in use can be deleted.

The Search Pages section contains additional information about search pages.

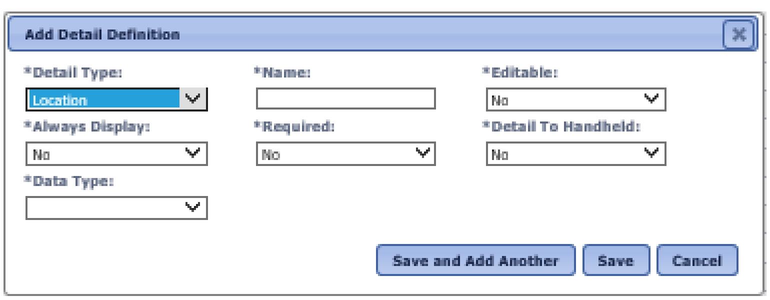
Creating and Modifying a Location Detail Definition

From After performing a detail definition search, click on the name of the detail definitions that is to be modified.

The Edit Detail Definition dialog box is displayed.

To create a new Detail Definition, click on the Add icon for Add Detail Definition.

The Add Detail Definition dialog box is displayed.



Add Detail Definition dialog box

Enter or modify the data for the detail definition

> **Detail Type** Detail types are used for grouping and reporting purposes. Select a detail type from the drop-down list.

Name The unique name of the detail. Enter the name of the detail. Up to 50 characters may be entered.

Editable Determines if the detail can be modified when creating or modifying. Select Yes or No from the drop-down list.

Always Display Details that have not been added to a location will not be displayed when viewing the object. If this field is set to “Yes” then the detail will always display, regardless of whether the detail has been added to the location. Select Yes or No from the drop-down list.

Required Determines if the detail is required when creating or modifying the location that has this detail assigned to it. Select Yes or No from the drop-down list.

Detail to Handheld Determines if the detail will be displayed on the Handheld. Select Yes or No from the drop-down list. Sending details to the Handheld will send additional data to the Handheld and could increase the synchronization times for the Handheld.

Data Type Determines the type of data that the detail will hold. Select a data type from the drop-down list. The data type selected determines the fields that will be prompted.

If a choice list data type is selected, then a list must be selected. A default value may be selected from the drop-down list.

If a discrete numeric value data type is selected, the size and precision must be entered.

If a discrete text value data type is selected, a size must be entered.

If a function data type is selected, then the function must be selected from the drop-down list.

Click the Save Add Another button to save the changes and add another detail, click the Save button to save the changes and return to the Location Detail Definitions page, or click the Cancel button without saving the changes and return to the Location Detail Definitions page.

Location Templates

Reviewing a Location Template

From the Main Menu, select Admin -> Location Templates.

The Location Templates page is displayed.

Use one or more of the filters to determine which of the location templates will be displayed. Leaving the filter blank will show all location templates.

Enter a name or a partial name of a location template in the **Name** filter.

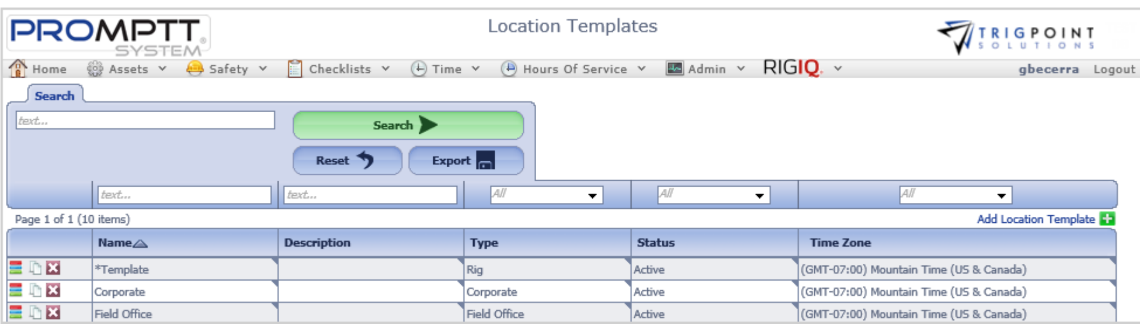
Enter a description or partial description of a location template in the **Description** filter.

Select one or more location types from the **Type** filter drop-down list.

Select one or more statuses from the **Status** filter drop-down list.

Select one or more time zones from the **Time Zone** filter drop-down list.

Click the Search button to display the results of the search.



Location Templates page

To delete a template, click the Delete icon.

The Remove dialog box will be displayed.

Click the OK button to delete the template, or click the Cancel button to return to the Location Templates page without deleting the detail.

Only templates that are not in use can be deleted.

The Search Pages section contains additional information about search pages.

Modifying a Location Template

From the Main Menu, select Admin -> Location Template.

The Location Templates page appears.

Use one or more of the following filters to limit the number of location templates displayed: Name, Description, Type, Status, or Time Zone. Leave the filters blank to select all templates.

Click the Search button.

The search results are displayed.

The existing location template can be edited using inline editing. Data cells that have a small triangle in the upper right-hand corner may be edited. Click on the data cell that is to be changed, enter the new value, or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

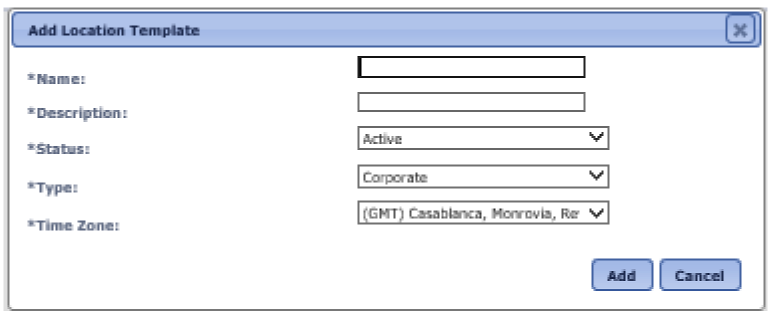
Creating and Copying a Location Template

From the Main Menu, select Admin -> Location Templates.

The Location Templates page appears.

To create a new location template, click the Add icon for Add Location Template.

The Add Location Template dialog box is displayed.



Add Location Template dialog box

To copy a location template, click the Copy icon to the left of the template.

The Copy dialog box is displayed.

Enter or change the data.

> **Name** The name of the template. The template name is used as the base name for any locations created using the template. Up to 50 characters can be entered for the name.
>
> **Description** The location description. This will be the default description for locations setup using the template. Up to 50 characters can be entered for the description.
>
> **Status** The default status of any location that is created from the template. Select a status from the drop-down list.
>
> **Type** The default type of any location that is created from the template. Select a type from the drop-down list.
>
> **Time Zone** The default time zone of any location that is created from the template. Select a time zone from the drop-down list.

All of the fields are required to create a location template.

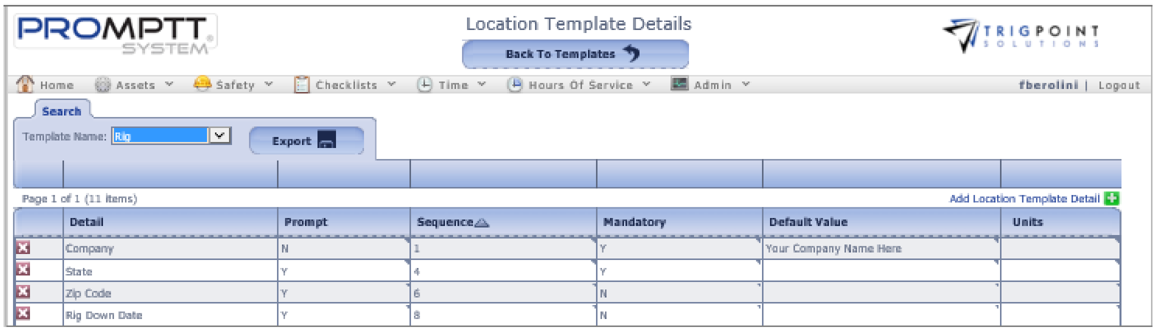
Click the Add button to save the template or click Cancel button to return to the previous page without saving the template.

Creating and Modifying Location Template Details

After creating a location template, the details to be associated with the template can be added.

After performing a location template search, click on the Details icon to the left of the template.

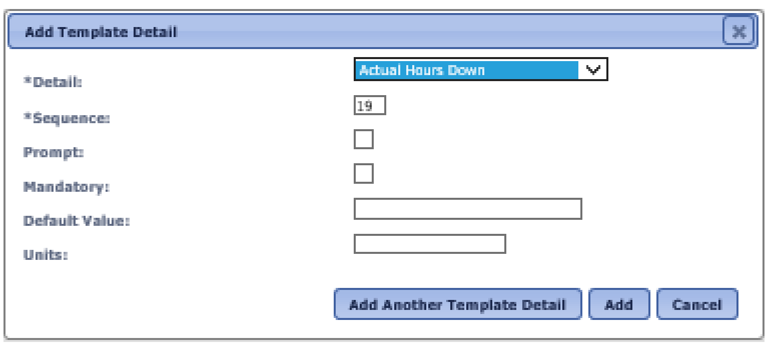
The Location Template Details page is displayed.



Location Template Details page

To add a detail, click the Add icon for Add Location Template Detail.

The Add Template Detail dialog box is displayed.



Add Template Details dialog box

Enter the data for the following fields

Detail Select a detail to add to the location detail from the drop-down list of detail definitions.

Sequence The sequence determines the detail display order when creating locations. Enter a number between 0 and 99.

Prompt The prompt determines whether the template prompts for the detail information when a location is being created. When the box is checked, the system will prompt for the detail value.

Default Value Used for the typical answer or if there is only one valid value. Details that are a data type of choice list will display a drop-down list of valid choices for the detail. Details that are a data type of date will display a calendar. Enter up to 50 characters for a text data type.

Units The unit of measurement of the detail. Enter up to 50 characters for the unit.

Note: It is recommended that if there is only one valid value the detail should not be prompted. This will contribute to the ease of data entry when adding locations.

Click the Add Another Template button to add more location details to the template, click the Add button to save the detail to the template, or click the Cancel button to return to the Location Template Detail page without saving the detail to the template.

The existing location template details can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be edited. Click on the data cell that is to be changed, enter the new text or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

Totco and Pason Integration

There is full integration available to the Totco and Pason systems. Environments that have the EDR integration feature can now view their well data and well time code data within the PROMPTT® System.

Well Data

From the Main Menu, select Admin -> Well Data.

The Well Data page is displayed.

Use one or more of the filters to determine which of the wells will be displayed. Leaving the filter blank will show all wells.

Enter a name or a partial name of a well in the **Name** filter.

Select one or more locations from the **Location** filter drop-down list.

Enter a name or a partial of an operator in the Operator filter.

Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Start Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Spud Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

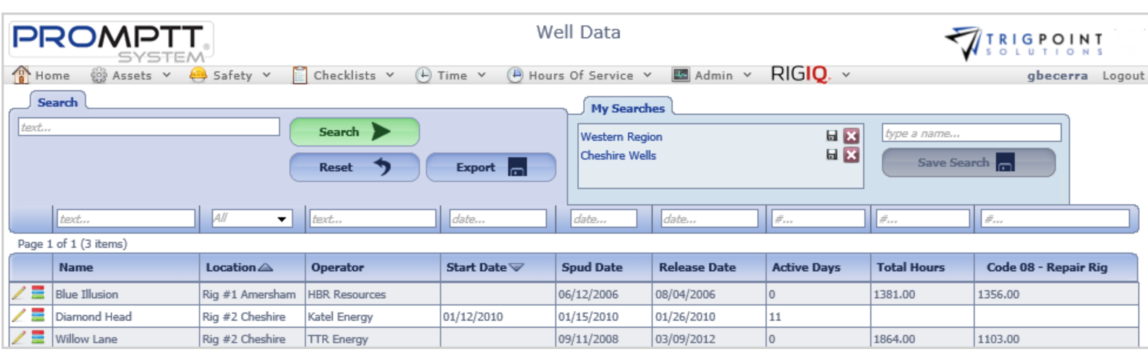
Check the radio button for Equal To, Before, or After and select a date from the calendar in the **Release Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter a numeric value in the **Active Days** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a numeric value in the **Total Hours** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Enter a numeric value in the **Code 08 – Repair Rig** filter. The less than, greater than or equals symbol can be used in conjunction with the value.

Click the Search button to display the results of the search.



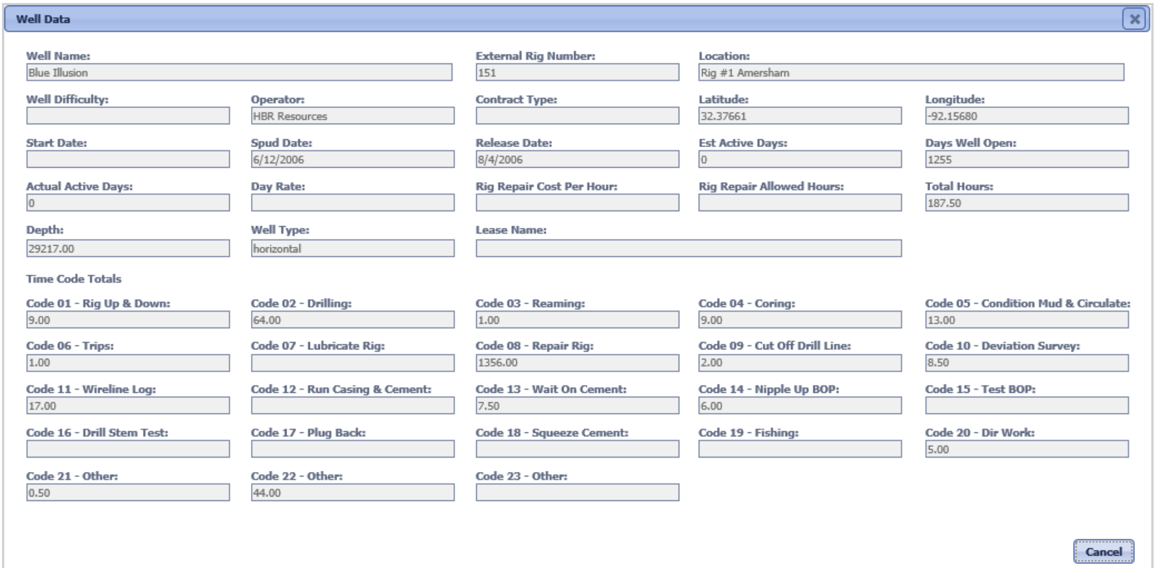
Well Data page

The Search Pages section contains additional information about search pages.

Viewing Well Data Details

After performing a search in the Well Data page, click on the Pencil icon to the left of the well name to view the well data details.

The Well Data dialog box is displayed with the with Well Data details.



Well Data dialog box

Click the Cancel button to return to the Well Data page.

Viewing Well Time Code Data

After performing a search in the Well Data page, click on the Details icon to the left of the well name to view the well time code data.

The Well Time Code Data page is displayed for the well.

Well Time Code Data page

To view a different well, select the well name from the drop-down list in the Name filter.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order. The arrow to the right of the column label will indicate the sort order.

Click the Export button to export the data into an excel format.

Click the Back to Well Data button at the top of the page when finished viewing the time code data.

JSA Management

JSAs can be associated with a checklist or a task.

Reviewing JSAs

From the Main Menu, select Admin -> JSA Management.

The JSA Management page is displayed.

Use one or more of the filters to determine which of the JSAs will be displayed. Leaving the filter blank will show all JSAs.

Enter a name or a partial name of a JSA in the **JSA** filter.

Enter a description or a partial description of a JSA in the **Description** filter.

Select one or more categories from the **Category** filter drop-down list.

Select one or more keywords from the **Keyword** filter drop-down list.

Select one or more tasks from the **Task** filter drop-down list.

Select one or more checklists from the **Checklist** filter drop-down list.

Enter a name or a partial name of a user in the **Updated By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.

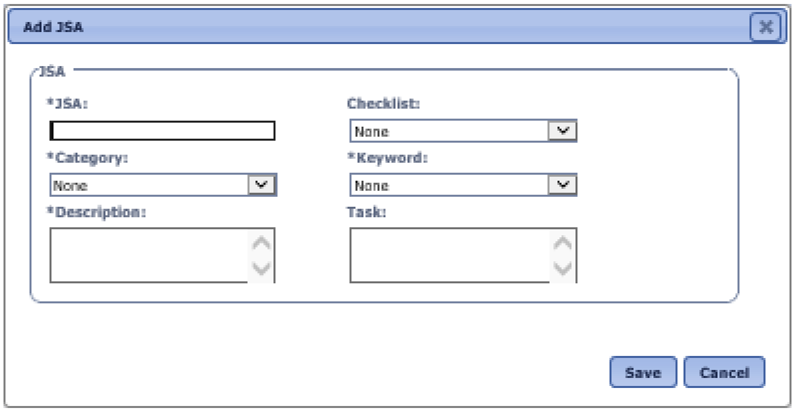
JSA Management page

The Search Pages section contains additional information about search pages.

Creating and Modifying a JSA

After performing a JSA search, click the Add icon for Add JSA to create a new JSA.

The Add JSA dialog box is displayed.



Add JSA dialog box

To modify a JSA, click on the Pencil icon to the left of the JSA.

The Edit JSA dialog box is displayed.

Enter or modify the following information

JSA The name of the JSA. Enter up to 50 characters for the name.

Checklist The checklist associated with the JSA. Select a checklist from the drop-down list. Only checklists assigned to JSA in the checklist template will be displayed.

Category The job safety category with which the JSA will be associated. Select a category from the drop-down list.

Keyword The keyword that will be used in JSA searches. Select a keyword from the drop-down list.

Description A description of the JSA. Enter up to a 300 characters for the description.

Task The name of the task. Up to 50 characters can be entered for the task.

Fields with an asterisk (*) are required to create a new JSA.

Click the Save button to save the JSA and return to the JSA Management page, or click Cancel button to return to the previous page without making any changes.

Time Capture

Setting up Time Capture

Time Capture is used to track an hourly user's time, whether in the field or in the office. Time Entries can be made from the handheld, from the PC Tablet, or from the website.

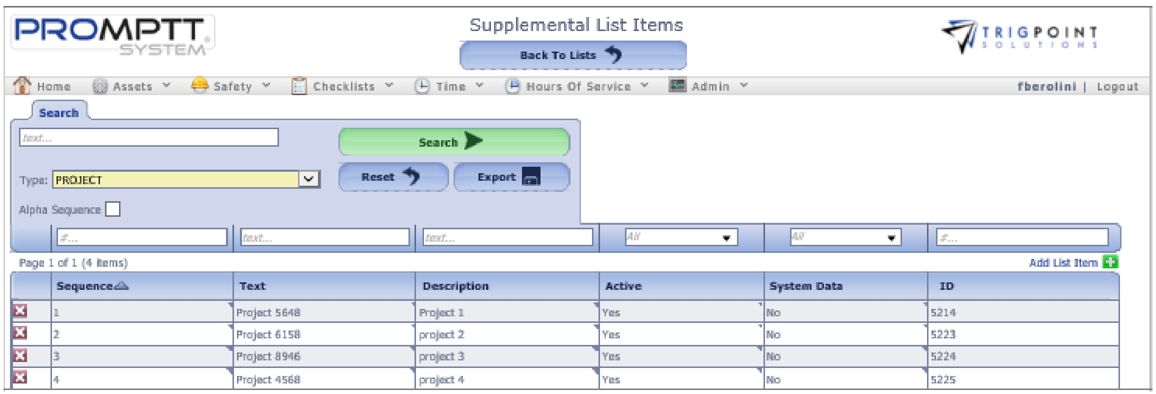
Project Codes

Creating and Modifying a Project Code

Projects Codes are a type of Supplemental List that is used to track labor hours by project.

From the Main Menu, select Admin -> Project Codes

The Supplemental List page is displayed with Projects selected as the Type.

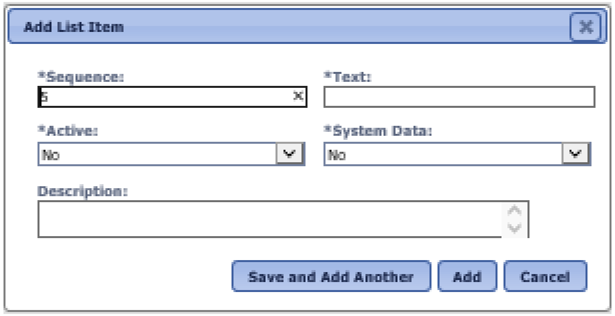


Supplemental List Items page - Project

The existing project codes can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be edited. Click on the data cell that is to be changed, enter the new text or select a value from the drop-down list and press the Tab or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new project code, click the Add icon for Add List Item.

The Add List Item dialog box is displayed.



Add List Item dialog box

Enter the following fields.

Sequence The position in the project list where the project code will be displayed. Enter a numeric value.

Text The text for the project code. Up to 50 characters may be entered.

Active Indicates whether the project code is active or not. Select Yes or No from the drop-down list.

System Data Select a No from the drop-down list.

Description A description of the project code. Enter up to 900 characters for the description.

Click the Save and Add Another button to save the code and add another project code, click the Add button to save the code and return to the Supplemental List Items page, or click the Cancel button without saving the code and return to the Supplemental List Items page.

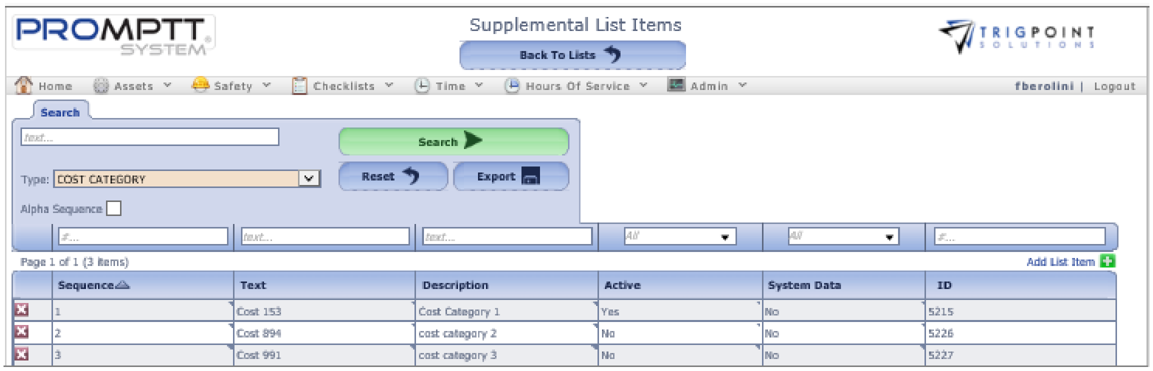
Cost Categories

Creating and Modifying a Cost Category

Cost Categories are a type of Supplemental List that are used to track labor hours by cost Category.

From the Main Menu, select Admin -> Cost Categories.

The Supplemental List page is displayed with Cost Categories select in the Type field.

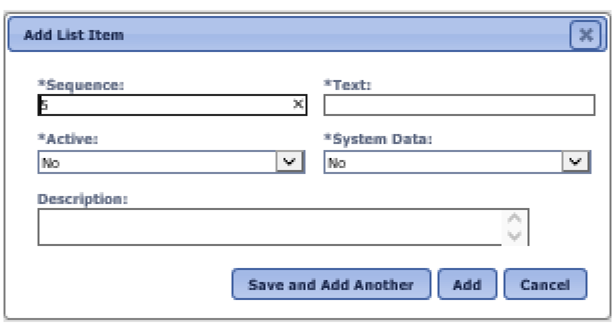


Supplemental List Items page - Cost Categories

The existing Cost Categories can be edited using inline editing. The data cells that have the triangle in the upper left-hand corner may be edited. Click on the data cell that is to be changed, enter the new text or select a value from the drop-down list and press the Tab, or Enter key to save the change. Click on another data cell instead of the Tab or Enter key to cancel the change.

To create a new Cost Category, click the Add icon for Add List Item.

The Add List Item dialog box is displayed.



Add List Item dialog box

Enter the following fields.

> **Sequence** The position in the cost category list where the Cost Category will be displayed. Enter a numeric value.
>
> **Text** The text for the Cost Category. Up to 50 characters can be entered for the text.

Active Indicates whether the Cost Category is active or not. Select Yes or No from the drop-down list.

System Data Select a No from the drop-down list.

Description A description of the Cost Category. Up to 900 characters can be entered for the description.

Click the Save and Add Another button to save the category and add another Cost Category, click the Add button to save the category and return to the Supplemental List Items page, or click the Cancel button without saving the category and return to the Supplemental List Items page.

Work Tasks

Work tasks are used in the Time Capture module to associate a drawing group with a project code and cost category.

Reviewing a Work task

From the Main Menu, select Admin -> Work tasks.

The Work tasks page is displayed.

Use one or more of the filters to determine which of the work tasks will be displayed. Leaving the filter blank will show all the work tasks.

Enter a drawing/group or partial drawing group in the **Drawing Group** filter.

Enter a work task name or partial work task name in the **Work Task Name** filter.

Enter a description or partial description of a work task in the **Description** filter.

Select one or more project codes from the **Project** filter drop-down list.

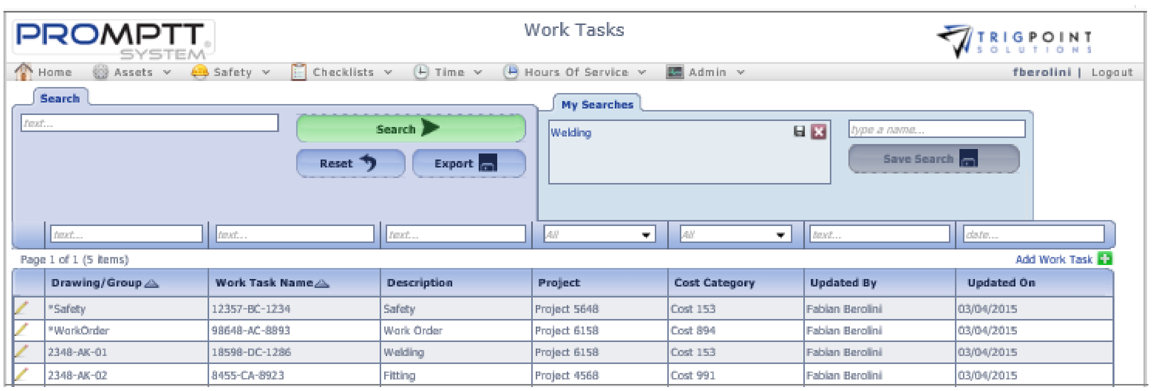
Select one or more cost categories from the **Cost Category** filter drop-down list.

Enter a name or partial name of a user in the **Updated By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Work Tasks page

To delete a work task, click the Delete icon to the left of the work task. Only work tasks that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Work Task

From the Main Menu, select Admin -> Work Tasks.

The Work Task page is displayed.

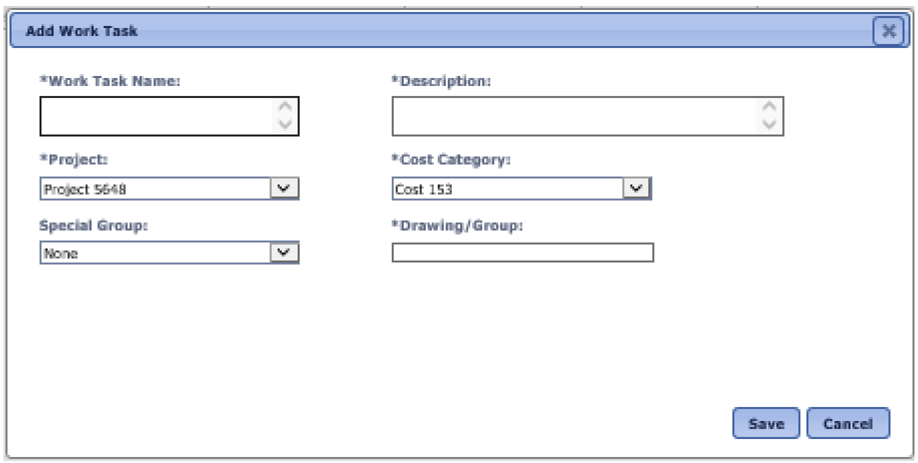
Use one or more of the following filters to limit the number of work tasks displayed: Drawing/Group, Work Task Name, Description, Project Code, Cost Category, Updated By, or Updated On. Leave the filters blank to select all Work Tasks.

Click the Search button.

The search results are displayed.

To create a new work task, click the Add icon for Add Work Task.

The Add Work Task dialog box is displayed.



Add Work Task dialog box

To edit an existing work task, click on the Pencil icon to the left of the work task.

The Edit Work Task dialog box is displayed.

Enter or modify the following fields

Work Task Name The name of the work task. Enter up to a 120-character unique work task code.

Description The description of the work task. Enter up to a 300-character description.

Project The project code associated with this work task. Select a project code from the drop-down list.

Cost Category The cost category associated with this work task. Select a cost category from the drop-down list.

Special Group A special group associated with this work task. Special Groups are used for other work not associated with a drawing such as safety and other custodial/maintenance tasks. Select a group from the drop-down list.

Drawing Group The drawing group associated with this work task. Enter up to a 120-character group.

All fields marked with an asterisk (*) are mandatory to add a work task.

Click the Save button to save the changes and return to the Work Task page**,** or click the Cancel button to return to the previous page without saving the changes.

Generating Pay Periods

Pay periods are used to define the different pay cycles within the company.

Reviewing a Pay period

From the Main Menu, select Admin -> Pay Periods.

The Pay Period Weeks page is displayed.

Use one or more of the filters to determine which of the pay periods will be displayed. Leaving the filter blank will show all pay periods.

Select one or more pay period designations from the **Pay Period Designation** filter drop-down list.

Enter a 4-digit year in the **Year** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a 1 or a 2 in the **Reporting Period** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Select one or more weeks from the **Week** filter drop-down list.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Start Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

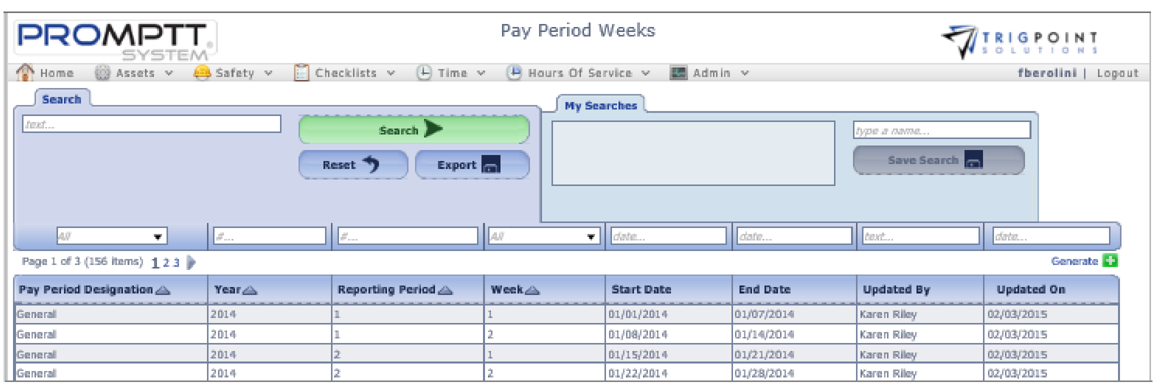
Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **End Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Enter a name or partial name of a user in the Updated By filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



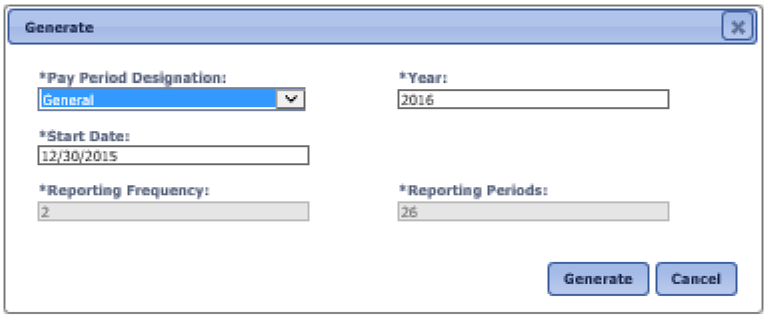
Pay Period Weeks page

The Search Pages section contains additional information about search pages.

Generating a Pay Period

After performing a pay period search, click the Add icon for Generate in the upper right-hand corner to generate a new pay period.

The Generate dialog box is displayed.



Generate dialog box

Enter the following information

Pay Period Designation The name of the pay period. Select a pay period from the drop-down list.

Year The year associated with this pay period. Enter a 4-digit year.

Start Date The date the pay period started. Select a date from the calendar.

Click the Generate button to create the pay period, or click the Cancel button to return to the Pay Period Weeks page without creating a pay period.

Departments

Departments are used to define Time Capture details and rules for a particular assignment.

Reviewing a Department

From the Main Menu, select Admin -> Departments.

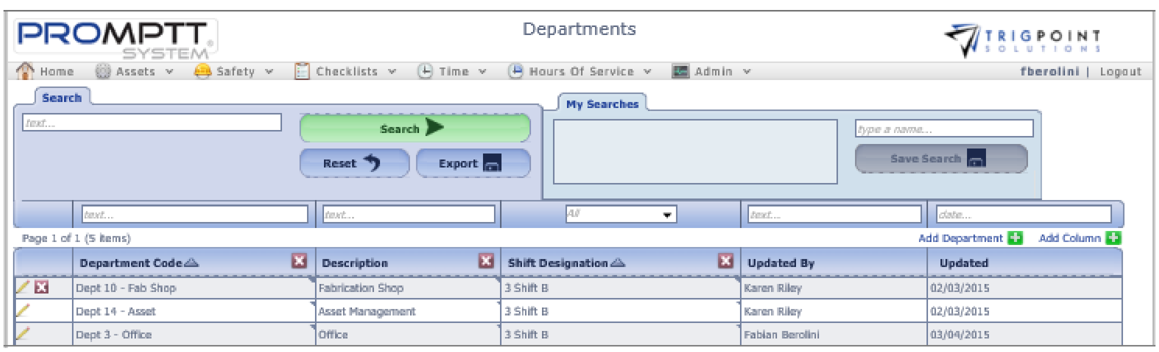
The Departments page is displayed.

Use one or more of the filters to determine which of the departments will be displayed. Leaving the filter blank will show all departments.

> Enter a department code or partial department code in the **Department Code** filter.
>
> Enter a description or partial description of a department in the **Description** filter.
>
> Select one or more shift designations from the **Shift Designation** filter drop-down list.
>
> Enter a name or partial name of a user in the **Updated By** filter.
>
> Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Departments page

To delete a department, click the Delete icon to the left of the department. Only departments that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

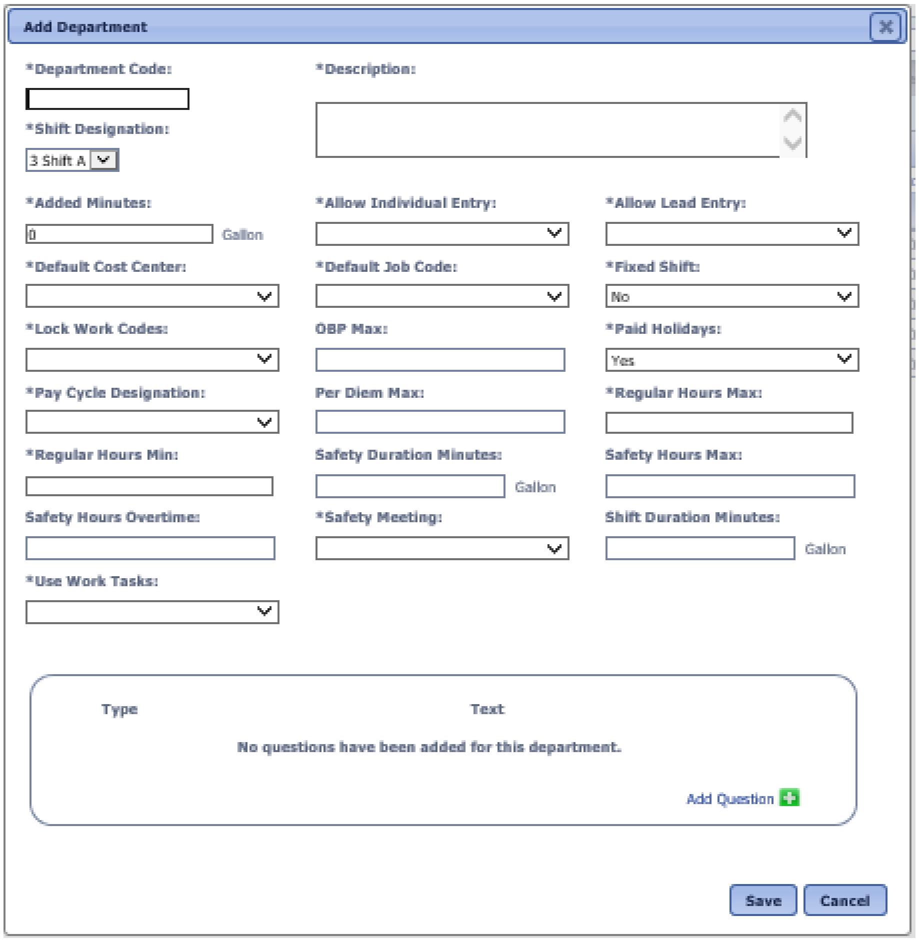
Creating and Modifying a Department

From the Main Menu, select Admin -> Departments.

The Departments page is displayed.

To create a new department, click the Add icon for Add Department.

The Add Department dialog box is displayed.



Add Department dialog box

To edit an existing department, click on the Pencil icon to the left of the department

The Edit Department dialog box is displayed.

Enter or modify the following fields. The fields after description are system defined detail definitions that are shipped with the system for use with the Time Capture module. They are used by the system's logic during time card entry and processing.

Department Code The code for the department. Enter a unique department code of up to 20 characters.

Description The description of the department. Enter up to 120 characters for the description.

Shift Designation The shift that will be used for users that are assigned to this department. Select a shift designation from the drop-down list.

Added Minutes The value entered here will be added to the user's time sheet when the Weekly Approval is run. Enter a number between 0 and 4.

Allow Individual Entry Determines whether the user is able to enter their time on an individual basis or must be in a shift. Select Yes or No from the drop-down list.

Allow Lead Entry Determines whether the user is able to start a shift as the lead. Select Yes or No from the drop-down list.

Default Cost Center The default cost category to which the user's time will be applied. Select a cost category from the drop-down list. The cost center can be changed by the user when entering time if the Lock Work Codes is set to "No".

Default Job Code The default project code to which the user's time will be applied. Select a project code from the drop-down list. The job code can be changed by the user when entering time if the Lock Work Codes is set to "No".

Fixed Shift Determines if the shifts for this department have a set time or if the actual time the user worked will be used. Select Yes or No from the drop-down list. When a Yes is selected, any shifts for the department will have a set time that cannot be modified during entry of time cards.

Lock Work Codes Determines if the cost center and job code can be changed for this department. When this is set to "Yes", all of the users assigned to this department will use the default cost center and job code only. Select Yes or No from the drop-down list.

OBP Max Determines if the users assigned to this department on a shift will be prompted to mark eligibility for Oil Based Pay (OBP). Entering a value greater than zero will cause the users to be prompted for OBP. Enter a value between 0 and 7.

Paid Holidays Determines if the users assigned to this department will receive holiday pay. Select a Yes or No from the drop-down list.

Pay Cycle Designation The pay cycle that users assigned to this department will use. Select a pay cycle from the drop-down list.

Per Diem Max Determines if the users assigned to this department will be prompted to mark eligibility for Per Diem pay. Entering a value greater than zero will cause the users to be prompted for Per Diem pay. Enter a value between 0 and 7.

Regular Hours Max The maximum number of hours that are paid at the regular rate. The value that can be entered here is defined in the detail definitions.

Regular Hours Min The minimum number of hours that are paid at the regular rate. The value that can be entered here is defined in the detail definitions.

Safety Duration Minutes The length of the safety meeting for users assigned to this department. The value that can be entered here is defined in the detail definitions.

Safety Hours Max The maximum time for a safety meeting. The value that can be entered here is defined in the detail definitions.

Safety Hours Overtime The maximum time that a safety meeting can be in overtime. The value that can be entered here is defined in the detail definitions.

Safety Meeting Determines whether the users assigned to this department are required to have a safety meeting. Select Yes or No from the drop-down list.

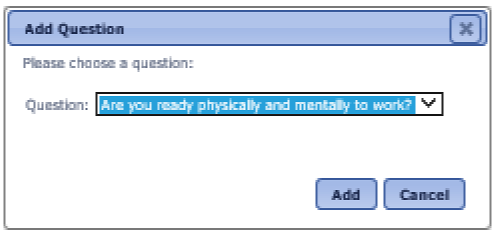
Shift Duration Minutes The default value to which any shifts assigned to this department will default. Enter a number between 0 and 1440. This value can be changed during the time entry for the shift.

Use Work Tasks Determines if the users assigned to this department may use work tasks. Select Yes or No from the drop-down list. Select a Yes will allow

Question Pane The questions that will be asked at the start and end of every shift in this department.

To add a question click the Add icon in the top left of the Question pane.

The Add Question dialog box is displayed.



Add Question dialog box

Select a question from the drop-down list.

Click the Add button to save the question and return to the previous page, or click the Cancel button to return to the previous page without saving any questions.

Click the Save and Add Another button to add another department, click the Save button to save the changes and return to the Departments page**,** or click the Cancel button to return to the previous page without saving the changes.

Adding Details to a Department

Once a department has been created, any user-defined details can be added to it for additional information or reporting purposes.

From the Main Menu, select Admin -> Departments.

The Departments page is displayed.

Use one or more of the following filters to limit the number of departments displayed: Department code, Description, Shift Designation, Updated By, or Updated. Leave the filters blank to select all departments.

Click the Search button.

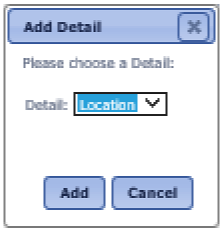
The search results are displayed.

Click on the Pencil icon to the left of the department that is to be modified.

The Edit Department dialog box is displayed.

Click on the Add Detail icon

The Add Detail dialog box is displayed.



Add Detail dialog box

Select a detail from the drop-down list. Only detail definitions that have been assigned to departments will be displayed in the list.

Click the Add button to add the detail to the department, or click the Cancel button to return to the Edit Department dialog box without making any changes.

Questions

Questions are asked at the beginning and end of a shift or a user's tour to verify that specific conditions have been met.

Reviewing a Question

From the Main Menu, select Admin -> Questions.

The Time Card Questions page is displayed.

Use one or more of the filters to determine which of the questions will be displayed. Leaving the filter blank will show all questions.

Select one or more question types from the **Question Type** filter drop-down list.

Enter the question text or part of the question text in the **Text** filter.

Enter the exception text or part of the exception text in the **Exception Text** filter.

Select one or more answer types from the **Answer Type** filter drop-down list.

Select Yes, No, or All from the **Positive** filter drop-down list.

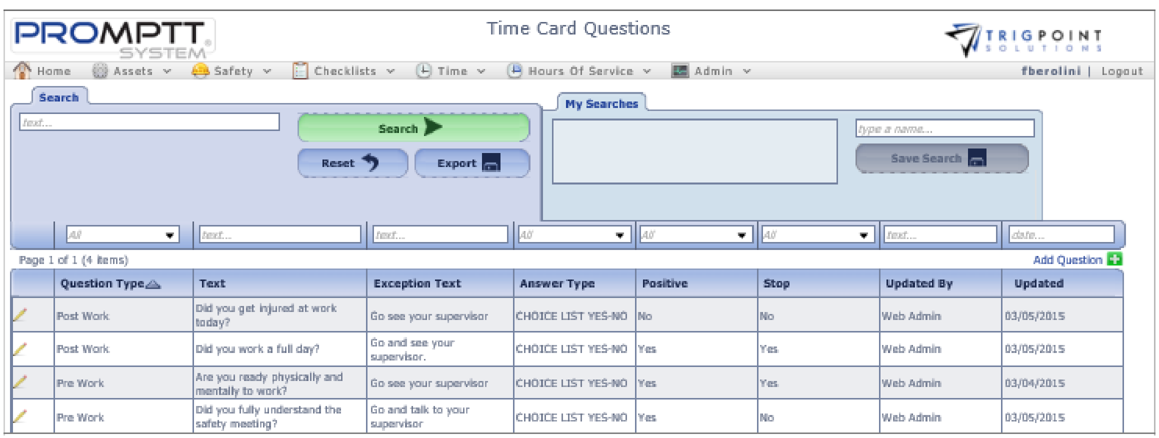
Select Yes, No, or All from the **Stop** filter drop-down list.

Enter a name or partial name of a user in the **Updated By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Time Card Questions page

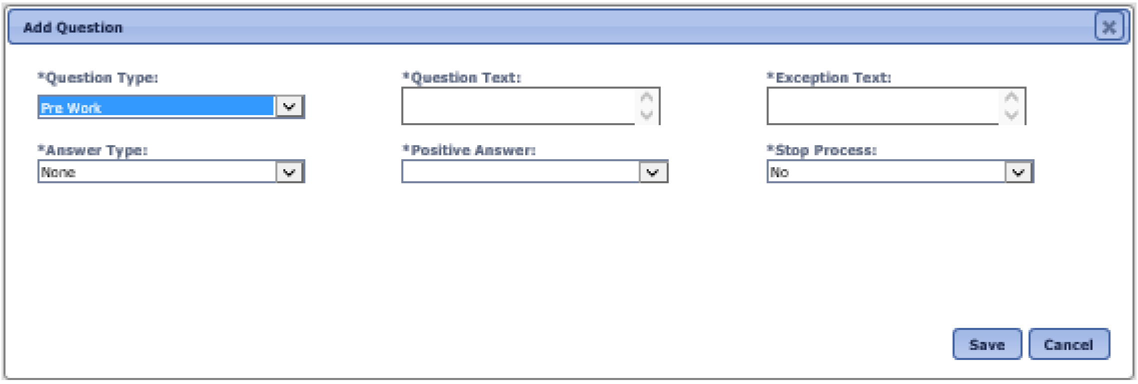
To delete a question, click the Delete icon to the left of the question. Only questions that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Question

From the questions page, click the Add icon for Add Question to create a new question.

The Add Question dialog box is displayed.



Add Question dialog box

To edit an existing question, click on the Pencil icon to the left of the question

The Edit Question dialog box is displayed.

Enter or modify the following fields

Question Type Questions are divided into groups: Pre Work that are asked when the user is signing in, Post Work which are asked when the user is signing out, and Post Safety which are asked when ending a safety meeting. Select a question type from the drop-down list.

Question Text The question as it will appear to the user. Enter up to a 300- character question.

Exception Text The text that will be displayed when a negative answer is given to the question. Enter up to 300 characters for the exception text.

Answer Type The choice list that will be used for the answer. Only choice lists that have two elements can be used for the answer type. Select a choice list from the drop-down list.

Positive Answer The value that would indicate a positive answer. Select the positive answer from the drop-down list.

Stop Process Indicates if the user can continue signing in or out of their time sheet if a negative answer is given. Select Yes or No from the drop-down list.

Click the Save button to save the changes and return to the Time Card Questions page**,** or click the Cancel button to return to the previous page without saving the changes.

Holidays

Holidays are used to track the holidays that are observed by the company.

Reviewing a Holiday

From the Main Menu, select Admin -> Holidays.

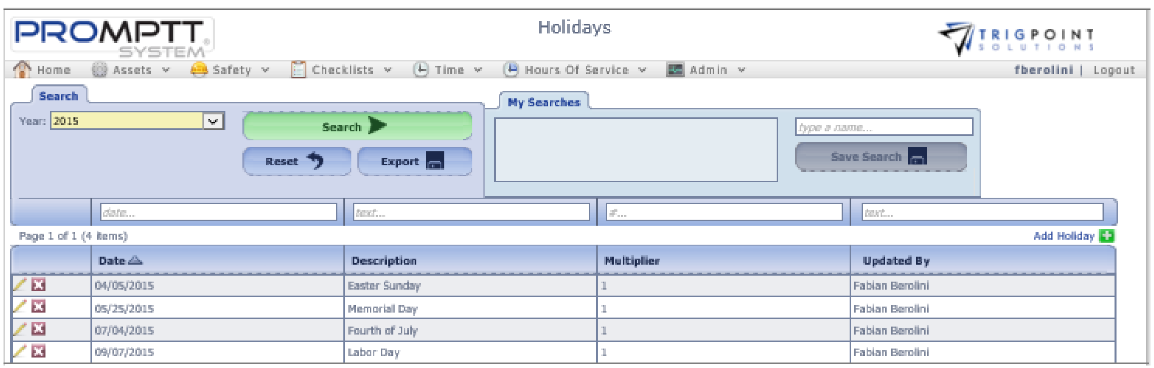
The Holidays page is displayed.

Use one or more of the filters to determine which of the holidays will be displayed. Leaving the filter blank will show all holidays.

> Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Date** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.
>
> Enter a description or partial description of a holiday in the **Description** filter.
>
> Enter a numeric value in the **Multiplier** filter. The less than, greater than or equals symbol can be used immediately preceding the value.
>
> Enter a name or partial name of a user in the **Updated By** filter.

Click the Search button.

The results of the search are displayed.



Holidays page

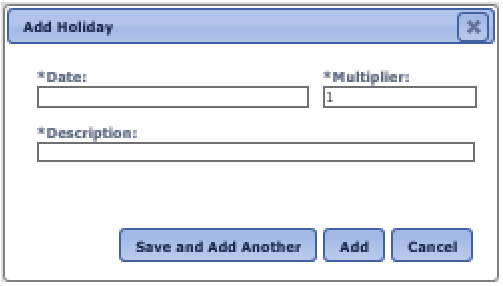
To delete a holiday, click the Delete icon to the left of the holiday. Only holidays that have not been used may be deleted.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Holiday

From the Holidays page, click the Add icon for Add Holiday to create a new holiday.

The Add Holiday dialog box is displayed.



Add Holidays dialog box

To edit an existing holiday, click on the Pencil icon to the left of the holiday

The Edit Holiday dialog box is displayed.

Enter or modify the following fields

Date The date of the holiday. Select a date from the calendar.

Multiplier For users that work on this holiday their pay will be multiplied by this amount. Enter a number between 1 and 9.

Description The description of the holiday. Enter an up to 120-character description.

Click the Save and Add Another button to add another holiday, click the Save button to save the changes and return to the Holidays page**,** or click the Cancel button to return to the previous page without saving the changes.

Shift Designations

Shift designations are used to logically group shifts together. A shift designation can have one or more shifts associated with it.

Reviewing a Shift Designation

From the Main Menu, select Admin -> Shift Designations.

The Shift Designations page is displayed.

Use one or more of the filters to determine which of the shift designations will be displayed. Leaving the filter blank will show all shift designations.

Enter a name or partial name of a shift designation in the **Shift Designation Name** filter.

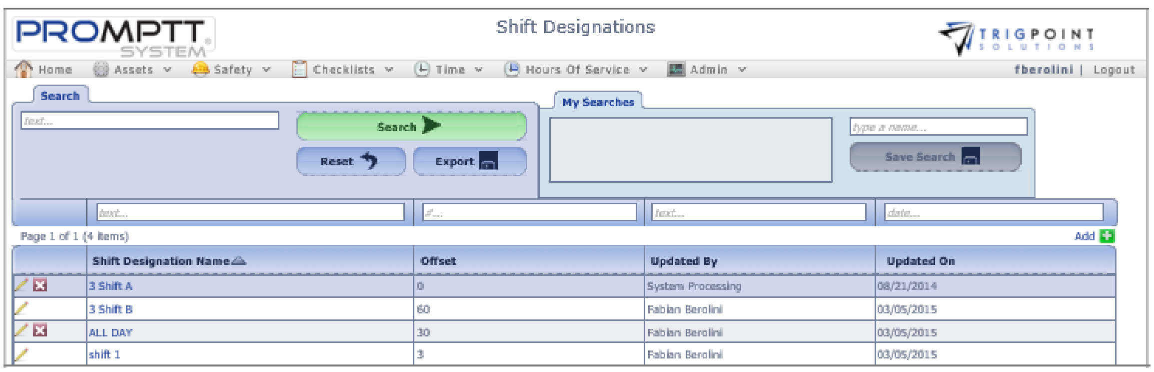
Enter a numeric value in the **Offset** filter. The less than, greater than or equals symbol can be used immediately preceding the value.

Enter a name or partial name of a user in the **Updated By** filter.

Check the radio button for Equal To, Before, or After and then select a date from the calendar in the **Updated On** filter. Leaving all the radio buttons blank will use equal as the operator for the filter.

Click the Search button.

The results of the search are displayed.



Shift Designations page

To delete a shift designation, click the Delete icon to the left of the shift designation. Only shift designations that have not been used may be deleted.

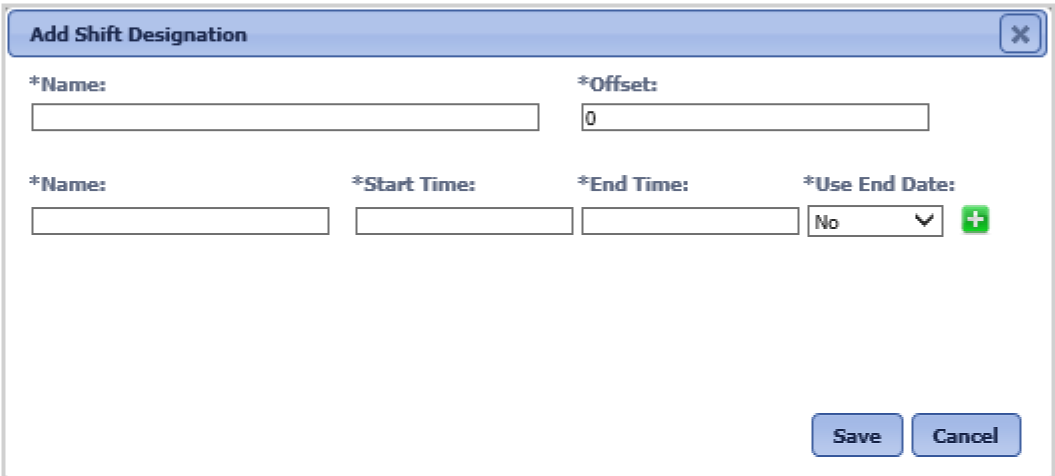
Click on the name of the shift designation to view the shift designation details.

The Search Pages section contains additional information about search pages.

Creating and Modifying a Shift Designation

From the Shift Designation page, click the Add icon to create a new shift designation.

The Add Shift designation dialog box is displayed.



Add Shift Designation dialog box

To edit an existing shift designation, click on the Pencil icon to the left of the shift designation.

The Edit Shift designation dialog box is displayed.

Enter or modify the following fields.

Name The name of the shift designation. Enter an up to 50-character name.

Offset The number of minutes that the user can be early or late and still be assigned to the shift. Enter a number between 0 and 720.

Name The name of the shift. Enter an up to 50-character name.

Start Time The start time of the shift. Enter the start time in a HH:MM NN format, where HH is hour, MM is minutes, and NN is the period. Use the left and right arrow key to move between the hours, minutes, and period.

End Time The end time of the shift. Enter the start time in a HH:MM NN format, where HH is hour, MM is minutes, and NN is the period. Use the left and right arrow key to move between the hours, minutes, and period.

Use End Date For shifts that ran over midnight, indicates whether the shift beginning date or the shift ending date should be used for the time card. Enter a Yes for the shift end date to be used, enter a No for the shift beginning date to be used.

All fields are required to add a new shift designation.

To add another shift to the shift designation click the Add icon.

Click the Save button to save the changes and return to the Shift Designations page, or click the Cancel button to return to the previous page without saving the changes.

Security

Introduction

Users in the PROMPTT® System inherit security from the *Everyone role and any additional roles that they own. Additionally, the user can have security set specifically for the user. See the Roles Section for more information about roles.

The PROMPTT® System's security is set up by individual security objects, by action types, or a combination of the two. A security object is a specific action on a specific object in the system, for example, adding components on the web application would be considered a security object. An action type is a specific action in the system. There is a table of security objects and their descriptions in Appendix A of this manual.

There are seven action types in the PROMPTT® System. The seven action types are Add, Change, Delete, Approve, Reject, Special, and Change Password. Turning on or off an action type grants or denies access to that action everywhere in the system. For example, if the Add action type is set No, then the user or role is denied access to add any objects in the system, including such objects as components, work orders, or supplemental lists, etc. This access is denied everywhere in the PROMPTT® System including the web, PC/Tablet Application, and the Handheld.

If no security is set up in the system for the security object, then the default is used. The default is to grant the user or role access to the object and is denoted as a blank. To deny a user or role access, set the security object to No. To give a user or role access, set the object to Yes. A positive will always override a negative. A negative will override the default. If a user has more than one role and the object is set to No for one role and it is set to Yes for another role, then the user will have access to the object.

Security objects will override Action Type security. If a user has Add Component set to No for the web and they have the action type of Add set to Yes, the user will not be able to add a component.

User security always overrides role security. If a user has a security object set to No, and the user's role has the object set to Yes, then the user will not have access to the object.

Examples:

User/Role	Add Component Security Object	Add Action Type
Role *Everyone	Default	Default
Role Manager	Yes	Yes
Role Web Admin	Yes	No
Role Web User	No	No
Driller	Default	Default

User A	Default	Default
User B	No	Yes
User C	Yes	No
User D	Default	No

User A is assigned roles *Everyone and Web Admin. He is granted access to add a component.

User B is assigned roles *Everyone and Manager. He is denied access to add a component.

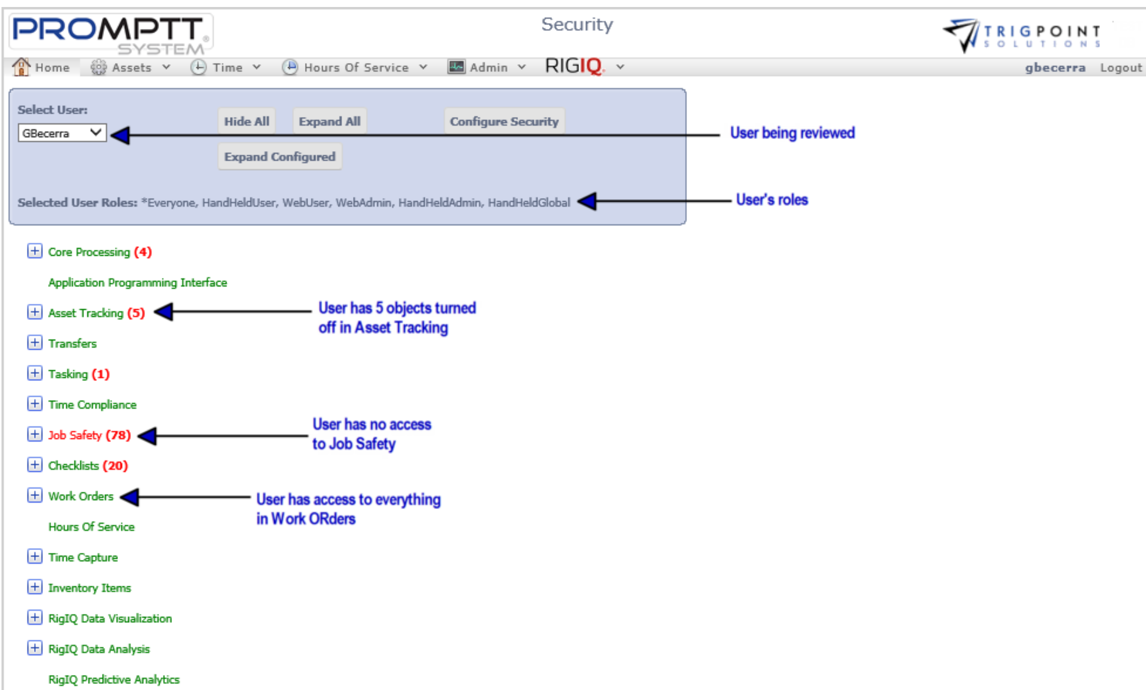
User C is assigned roles *Everyone and Web User. He is granted access to add a component.

User D is assigned the role *Everyone and Driller. He is denied access to add a component.

Reviewing Security

From the Main Menu, select Admin -> View Security.

The Security page is displayed.



Security page

The Security page defaults to the logged in user and all of the user's roles are displayed. A different user can be selected from the Select Users drop-down list.

The page displays the net security of the user when all of the user's roles and the user's security are taken into account. Objects to which the user has access are in green. Objects to which the user has been denied access are in red. Each category has the total number of objects to which the user has been denied access in red.

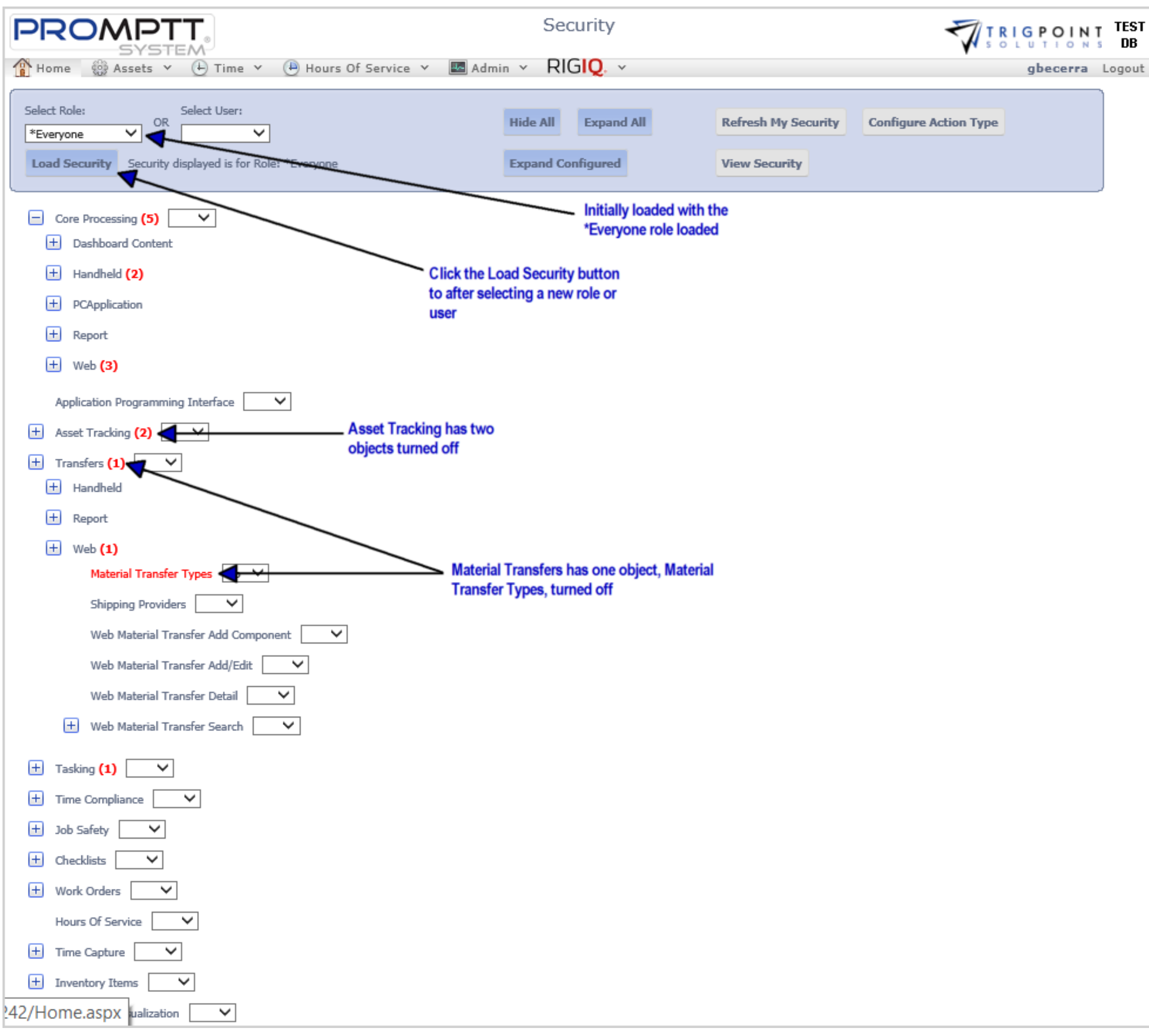
When the Security page is initially opened, it is in a collapsed view. This can be changed by clicking the Expand All button, expanding all of the security objects. Clicking the Expand Configured button will only expand objects that are not set to the default value. Clicking the plus icon to the left of the object will only expand the specific object. Clicking the Hide All button will collapse the view again.

The Configure Security button will display the Configure Security page.

Configuring Security

From the Main Menu, select Admin -> Configure Security.

The Security page is displayed with the *Everyone role loaded.



Security page

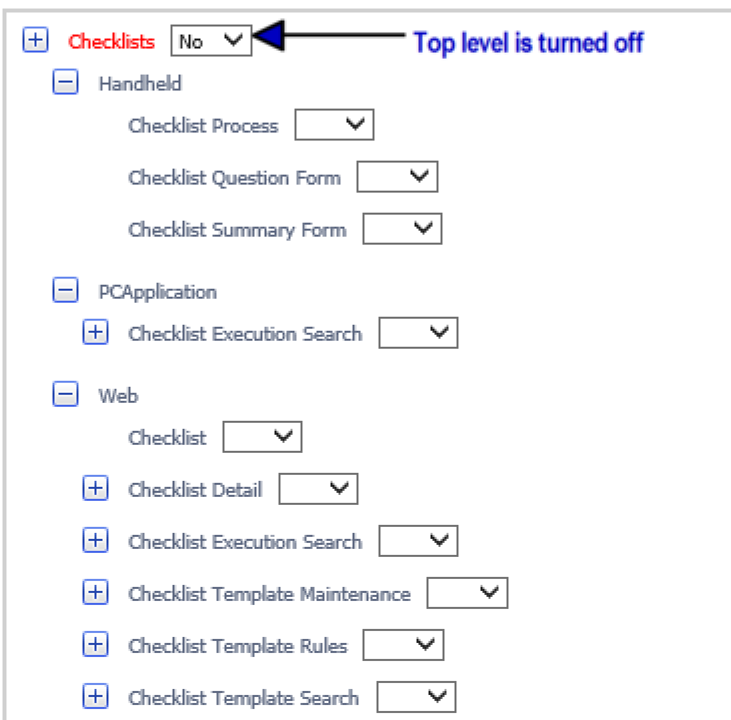
Select a role from the Select Role drop-down list or select a user from the Select User drop-down lists and click the Load Security button.

*Any changes made when the Security page is initially opened will be to the *Everyone role unless a new user or role is loaded into the page.*

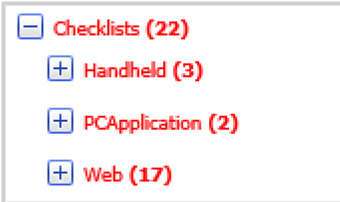
Adding Object Security

Expand the area of security that is to be modified, click the drop-down list to the right of the security object and select No or Yes. Selecting Yes will grant access to the user or role. Selecting No will deny access to the user or role. Leaving it blank will grant the user or role access, but if another role for the user is set to No for the security object, then it will override the default access and the user will be denied access.

When the top object in a hierarchy is set to No, then all of the objects below it will be turned off also. For example if Checklists is set to No in Configure Security, all of the checklist functionality will be set to No in the system for the user or role.



Checklist security set to No



View Security

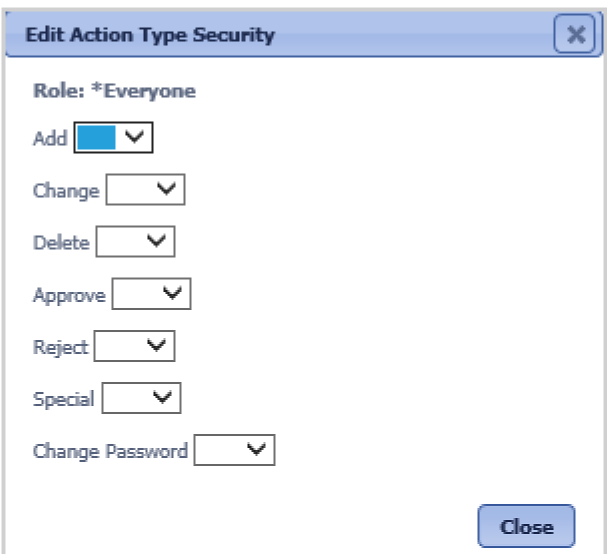
Under normal circumstances, new security will not take effect on the web until the user has logged out of the PROMPTT® System and then logged back in. When the user logged in is the user whose security is being modified, clicking the Refresh My Security button will shortcut this and the user will see the changed immediately.

On the Handheld application, new security will not take effect until the PROMPTT® System has been stopped and restarted. On the PC/Tablet application, new security will not take effect until the user has logged out of the PC/Tablet application and logged back in.

Adding Action Type Security

Click the Add Action Types button to setup security by action type.

The Edit Action Type Security dialog box is displayed.



Edit Action Type Security dialog box

Click the drop-down list to the right of the action type and select No or Yes. Selecting Yes will grant access to the user or role. Selecting No will deny access to the user or role. Leaving it blank will grant the user or role access, but if another role for the user is set to No for the action type, then it will override the default access and the user will be denied access.

Add Grants or denies the user or role access to add objects, such as components or item templates, to the PROMPTT® System.

Change Grants or denies the user or role access to change objects, such as components or item templates, to the PROMPTT® System.

Delete Grants or denies the user or role access to delete objects, such as components or item templates, to the PROMPTT® System.

Approve Grants or denies the user or role access to approve objects, such as work orders, in the PROMPTT® System.

Reject Grants or denies the user or role access to reject objects, such as observation cards, in the PROMPTT® System.

Special Grants or denies the user or role access to special objects.

Change Password Grants or denies the user or role access to change passwords for a user in the system.

The Edit Action Type dialog box will close each time a configuration change is made. Simply click the Configure Action Type button to enter another configuration change. Click the Close button to exit the Edit Action Type dialog box and return to the Security page when no changes are to be made.

Clicking the View Security button will show the Security page defaulting to the logged in user. All of the user's roles are displayed. A different user can be selected from the Select Users drop-down list.

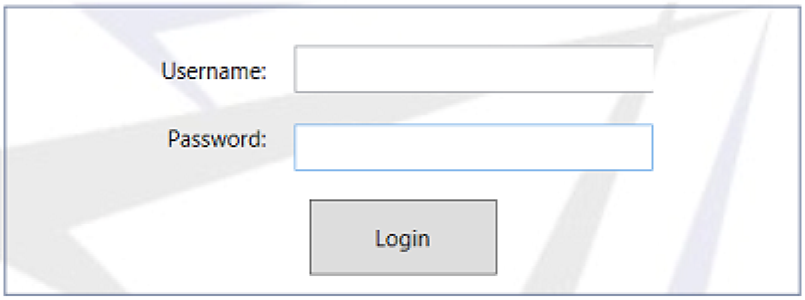
The page displays the current net security of the user when all of the user's roles and the user's security are taken into account. Objects to which the user has access are in green. Objects to which the user has been denied access are in red. Each category has the total number of objects to which the user has been denied access in red.

The PC/Tablet Application

Logging into the PC/Tablet Application

On the tablet, click the TrigPointPromptPC icon.

The Login page appears.



Login screen

In the Username box, type your user name or scan your user RFID tag.

If you have selected to have your tablet save user names, use the drop-down list to select your user name. This does not apply to your first time logging in.

If you are not using an RFID chip, in the Password box, type your password. The password is case sensitive.

Click Login

The Main Menu will display.

Main menu

Clicking the Home icon in the top left corner of the menu will return you to the Main menu.

To the right of the Sync icon is the last date and time that the device successfully synchronized. Clicking the Sync icon will start a synchronization session.

To the right of the Location icon is the device's location.

When the device is shared, to the left of the Logout icon is the current user's username. Clicking the Logout icon will return the user to the Login page.

Icons used on the PC App

Icon	Name	Action
	System Information	Displays the System Information screen
	Sync	Synchronizes the system
	Lightning bolt	Execution
	Location	Displays the current location
	End Shift	Ends the shift
	Go to Lunch	Marks the user as at lunch
	Home	Returns to the main menu
	Log File	Displays the log file
	Sign In	Signs the user into his time card
	Sign out	Signs the user out of his time card
	Safety Meeting	Starts the safety meeting
	Shift Control	Starts the shift
	Individual Time	Starts an individual time card
	Users	Displays the Select User screen
	Logout	Logs the user out of the PROMPTT® System
	Admin	Displays the Admin Menu
	Edit Shift	Edits the shift
	Return from Lunch	Returns the user to paid time
	End Shift	Ends the shift
	Data Reset/Recover	Displays the Reset Data/Recover Data dialog box
	RFID	Displays the Scan User screen
	Picture	Displays the Camera screen

	TrigPointPromptTPC	Starts the Tablet/PC Application

Table 3 – PC/Tablet App Icons

Users on the Tablet

Assigning a User Tag on the Tablet

While a tablet user does not need an RFID tag in order to use the tablet, it is much quicker and easier to use the RFID tags for the users.

From the Main menu, select the Users icon.

The Select User screen is displayed.

Use one or more of the filters to determine which of the users will be displayed. Leaving the filter blank will show all users.

Enter a username or partial username of user in the **Username** filter.

Enter a first name or partial first name of user in the **First Name** filter.

Enter a last name or partial last name of user in the **Last Name** filter.

Enter an externalID 1 or a partial externalID 1 of user in the **ExternalID 1** filter.

Enter an externalID 2 or a partial externalID 2 of user in the **ExternalID 2** filter.

Click the Search button to display the results of the search.

The search results are displayed.

Photo	RFID Tag	Username	First Name	Last Name	External ID 1	External ID 2
		webadmin	Web	Admin	5489	
		JAlbornoz	Jeremy	Albornoz	5648	
		GBecerra	Gustav	Becerra	1288	
		FBerolini	Fabian	Berolini	6589	
		ICarrizo	Ian	Carrizo	5832	
		WEgan	Walter	Egan	2387	

Select User screen

Click the RFID icon to the left of the user.

The Scan User screen is displayed.

Scan User screen

Scan the tag

The RFID is assigned to the selected user

Adding a User Picture on the Tablet

While a tablet user does not need a picture assigned to them in order to use the tablet, it is much quicker and easier to identify the user when a picture is assigned to them.

From the Handheld Admin menu, select Users.

The Select a User screen is displayed.

Use one or more of the following filters to limit the number of users displayed: Username, First Name, Last Name, ExternalID 1, or ExternalID 2. Leave the filters blank to select all users.

Click the Search button.

The search results are displayed.

Click the Picture icon to the left of the user.

The Camera screen is displayed.

Camera screen

To change cameras on the tablet, click the Switch Camera button to switch to the other camera.

To take the picture of the user, focus the camera on the user and click the Take a Photo button.

The photograph is taken and displayed.

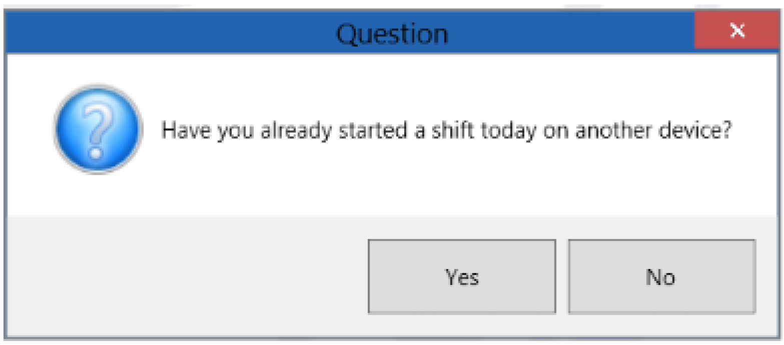
Click the Save button to save and return to the Assign Users screen, or click the Cancel button to return to the Assign Users screen without saving the picture.

Time Capture on the Tablet

Shift Entry on Tablet

From the Main menu, click on the Shift Control icon .

The Question dialog box is displayed.



Question dialog box

If you have already started a shift on another device and it has not ended, click the Yes button.

A prompt to synchronize the device before continuing will be displayed.

Synchronize the device to bring down the existing shift and then click on the Shift Control icon .

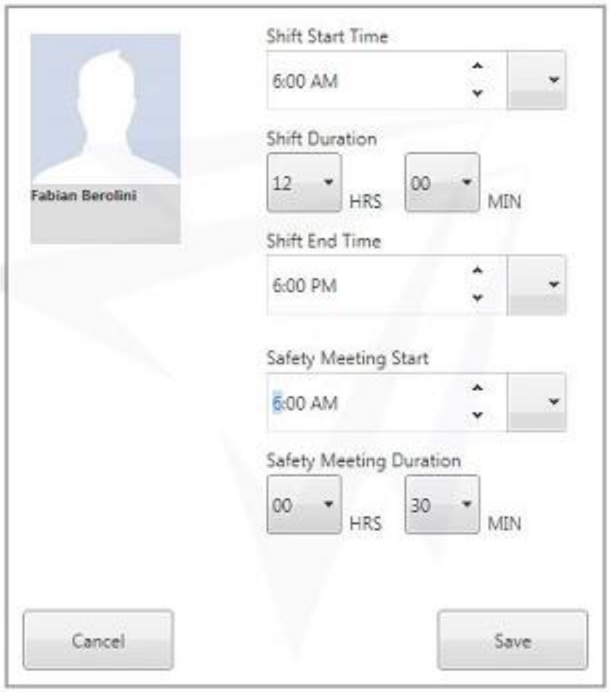
If a shift has not been started on another device, click the No button.

If the user's assigned department has pre-work questions, they will be asked at this time.

Pre-work Question dialog box

Answer all of the pre-work questions.

The Shift screen will be displayed.



Shift screen

The shift will default to the values setup in the Shift Designation used by the department. The shift duration defaults to the value set in the department. Any of the shift details can be modified.

Shift Start Time The starting time for the shift.

Shift Duration The length of the shift in minutes.

Shift End The ending time of the shift.

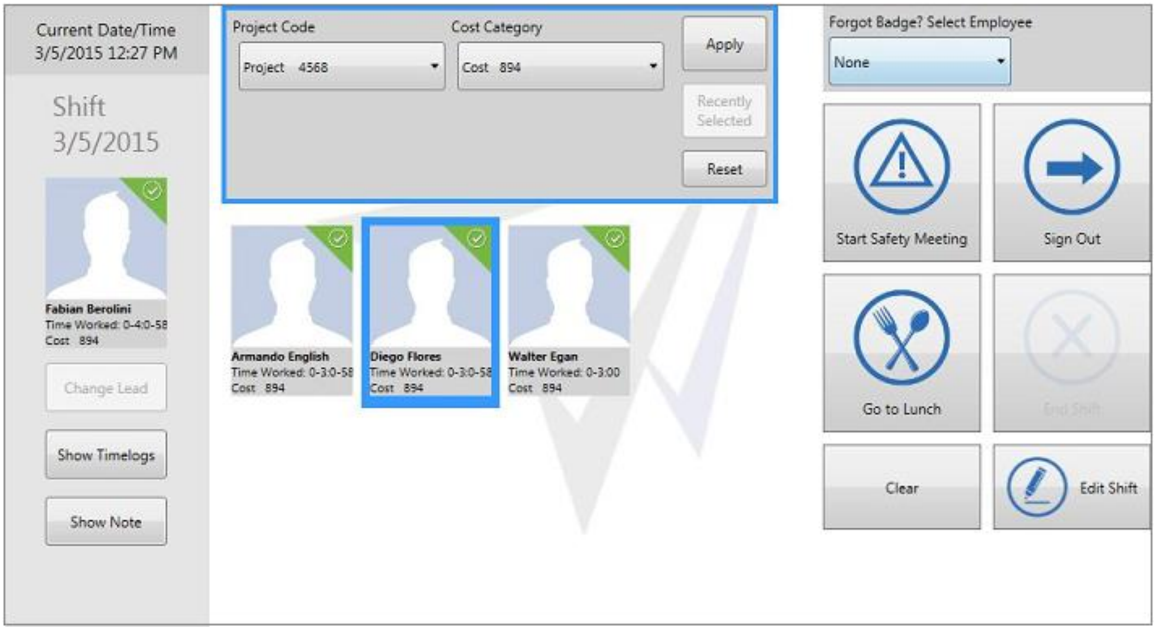
Safety Meeting The length of time, in minutes, that is allocated for the safety meeting.

Per Diem If the department is setup for it, the Per Diem checkbox will be displayed. Check the Per Diem checkbox if the users on the shift are eligible to receive per diem pay. This can be changed on an individual basis.

OBP If the department is setup for it, the Oil Based Pay (OBP) checkbox will be displayed. Check the Per Diem checkbox if the users on the shift are eligible to receive per diem pay. This can be changed on an individual basis.

Click the Save button to save the shift or accept the defaults, or click the Cancel button to exit the shift.

The Shift Control screen is displayed.



Shift Control screen

To add a user to the shift, scan the user tag or select an user from the drop-down menu. Only users who are active, in the department, and don't have an open time card will be available for selection. For each user, the same pre-work questions will be asked.

The project code and cost category default to the values set up in the department.

To assign a different project code or cost category, click on or scan the users to be changed.

Select the project code from the drop-down list.

Select the cost category from the drop-down list.

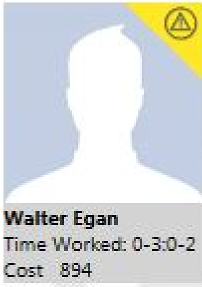
Click the Apply button.

Repeat this process for all users on the shift as required.

Departments can have the project code and cost category locked. When this is the case, the project code and cost category cannot be changed for users in the department.

Once all users have been added to the shift, select the Start Safety Meeting icon .

All of the users on the shift are displayed as attending a safety meeting. Users that are in a safety meeting are denoted with a yellow triangle in the upper left-hand corner of their icon.



User attending a safety meeting

Once the safety meeting has ended, click the End Safety Meeting icon.

The user icons will return to their original state.

To record meal times, select or scan the users that are being sent to lunch by clicking on their icon. Users that have been selected will have their icon outlined in blue. Users can be unselected by clicking on their icon a second time.

Selected User

Click the Go to Lunch icon.

Users that are at lunch are denoted with an orange triangle in the upper right-hand corner of their icon.

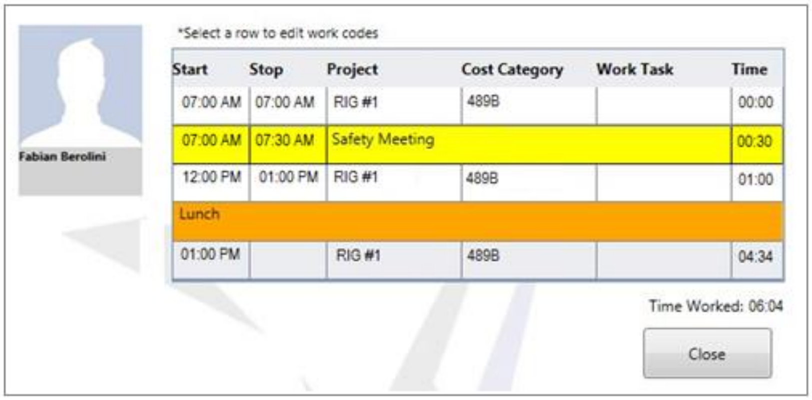
User at lunch

As users return from lunch, click the user's icon, modify the project code or cost category as required, and click the Return from Lunch icon.

If users return at the same time, and are using the same project code and cost category they can be selected in a group and the Return from Lunch icon clicked.

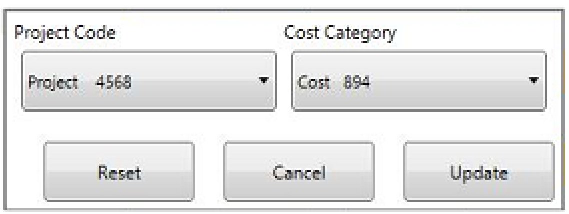
An user's actual time is stored in the timelogs. The Timelogs can be viewed by clicking on the user's icon and then clicking the Show Timelogs button.

The Time Log screen is displayed.



Time log screen

Clicking on a row in the time log will bring up the Edit Time Log dialog box



Edit Time Log dialog box

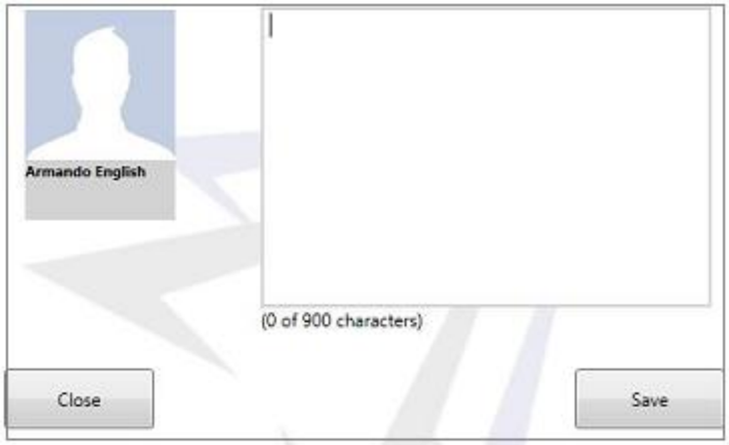
Click on the drop-down list for the project code or cost category to change them.

Click the Update button to save the changes and return to the Time log screen, click on the Reset button to reset the data back to its original value, or click the Cancel button to return to the previous screen without saving any changes.

Click the Close button to return to the Shift Control screen.

A note can be added at any time to a user's time card. Click the user's icon or scan their tag and click the Show Note button.

The Show Note dialog box is displayed.



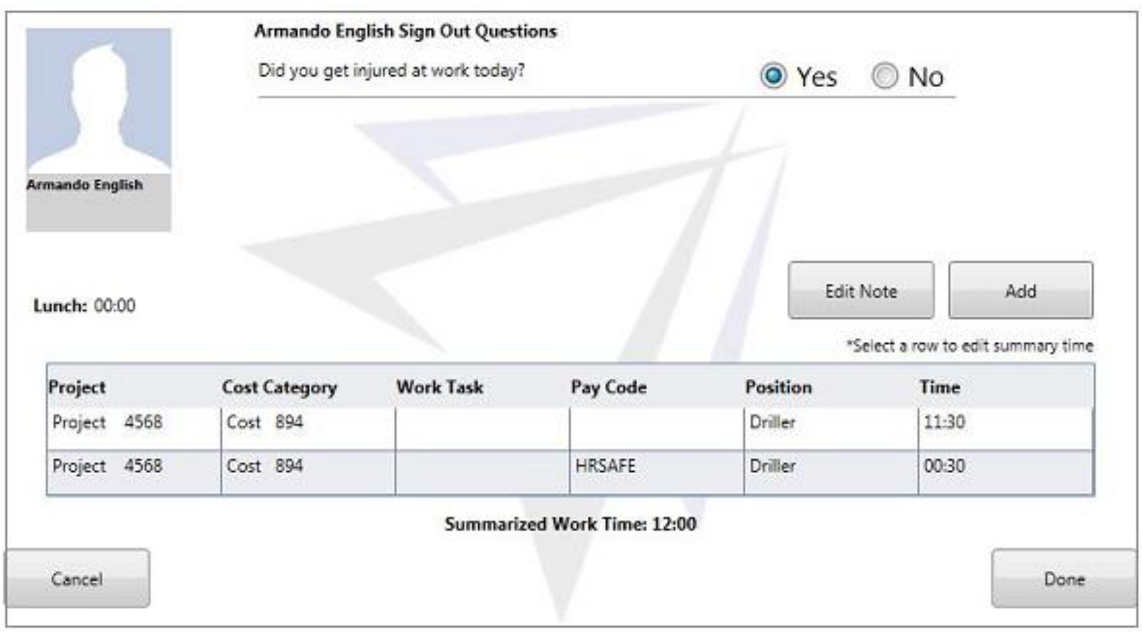
Show Note dialog box

Enter a note of up to 900-characters.

Click the Save button to save the note and return to the Shift Control screen, or click the Close button to return to the Shift Control screen without saving the note.

At the end of the shift, click the user's icon or scan the user tag and click the Sign Out icon. All users must be signed out before the lead can sign out and close the shift.

The Sign Out screen will be displayed.

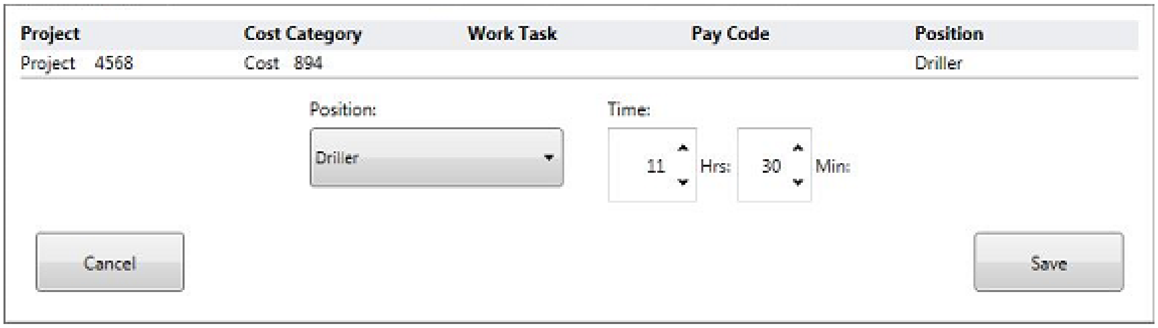


Sign Out screen

Answer all post-work questions.

The summary record can be changed by clicking on the data cell in the time column.

The Summary Edit dialog box is displayed.



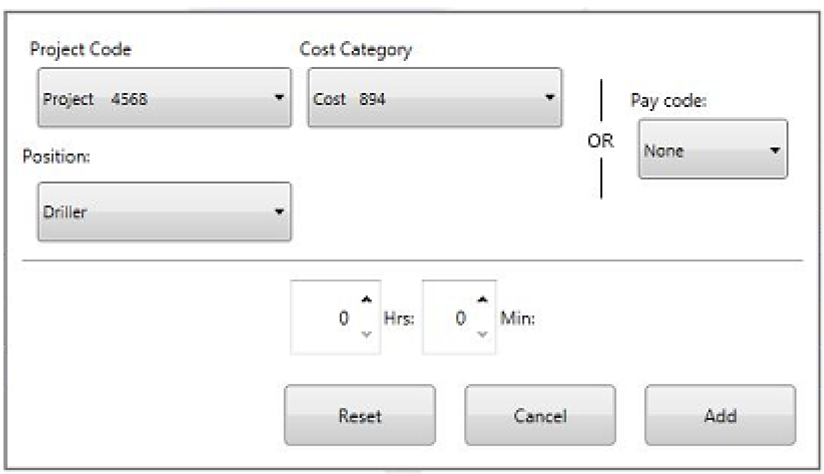
Summary Edit dialog box

Change the position by clicking on the drop-down list. Change the time by clicking on the spinner arrows.

Click the Save button to save the changes and return to the Sign Out screen, or click the Cancel button to return to the previous page without saving any changes.

Time can be added to the summarized time by clicking on the Add button.

The Add Time dialog box is displayed.



Add Time dialog box

Select a Project Code, Cost Category, and Position from their respective drop-down lists, or select a Pay code from the pay code from down list.

Enter a time by clicking the spinner arrows for hours and minutes.

Click the Add button to add the record to the summarized time and return to the Sign Out screen, click the Reset button to return the values to their initial values, or click the Cancel button to return to the Sign Out screen without making any changes.

Notes can viewed or edited by clicking the Edit Note button.

When all the post-work questions have been answered and the summary records are correct, click the Done button.

Each user must be signed out individually in order to answer any post-work questions.

Once all users have been signed out, the lead can then end the shift by selecting the End Shift icon ⊗.

The system will automatically synchronize the device.

The Sign Out screen will be displayed.

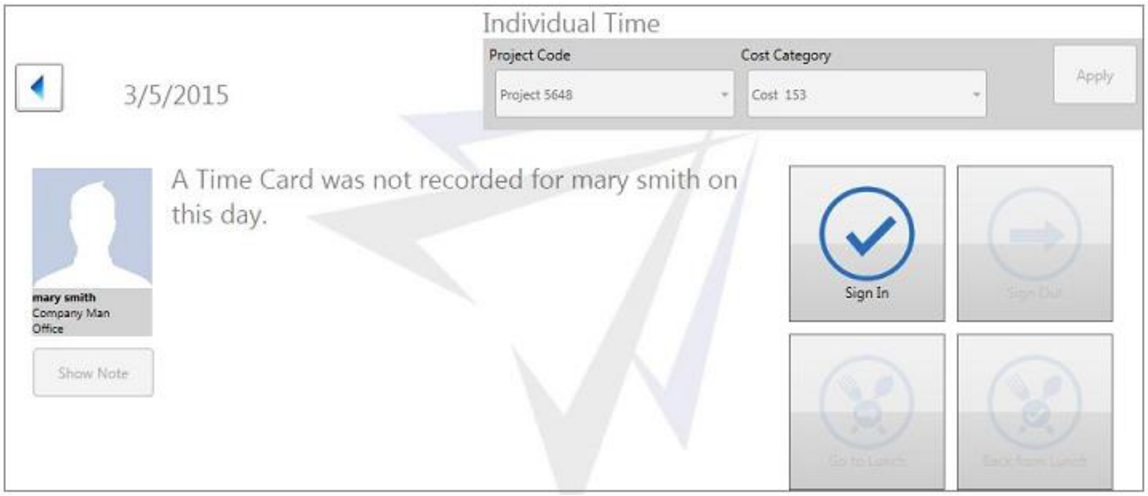
The lead follows the same sign out steps as the users.

When the lead clicks the Done button, the system automatically synchronize the device.

Individual Entry on Tablet

Users can enter their time on the tablet on an individual basis rather than as part of a shift. From the Main menu, click on the Individual Time icon .

The Individual Time screen is displayed.



Individual Time screen

Click on the left arrow to set the date for the time that is being tracked. Users can only sign in to the current date.

The Project Code and/or Cost Category default to the values set up in the department. To change the project code or cost category select the project code or cost category from the drop-down list and click the Apply button.

Departments can have the project code and cost category locked. When this is the case, the project code and cost category cannot be changed for users in the department.

Select the Sign In icon .

A Per Diem check box will be displayed if the user’s department has per diem pay. When the Per Diem check box is clicked, the user will be marked as eligible for per diem pay.

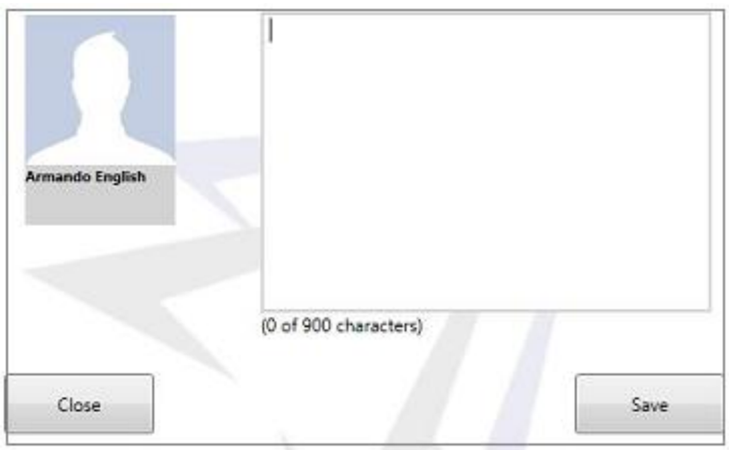
If the user’s department has pre-work questions, they will be asked at this time.

Pre-Work Question dialog box

Select the answer for any questions that are asked. Depending on how the question was setup, when the users gives a negative answer to a pre-work question he will receive either a warning or may not be able to continue signing in.

A note can be added to a user's time card. Click the user's icon and then click the Show Note button.

The Show Note dialog box is displayed.



Show Note dialog box

Enter a note of up to 900-characters.

Click the Save button to save the note and return to the Individual Time screen, or click the Close button to return to the Individual Time screen without making any changes.

To record meal times, click the Go to Lunch icon .

The Back from Lunch icon is activated.

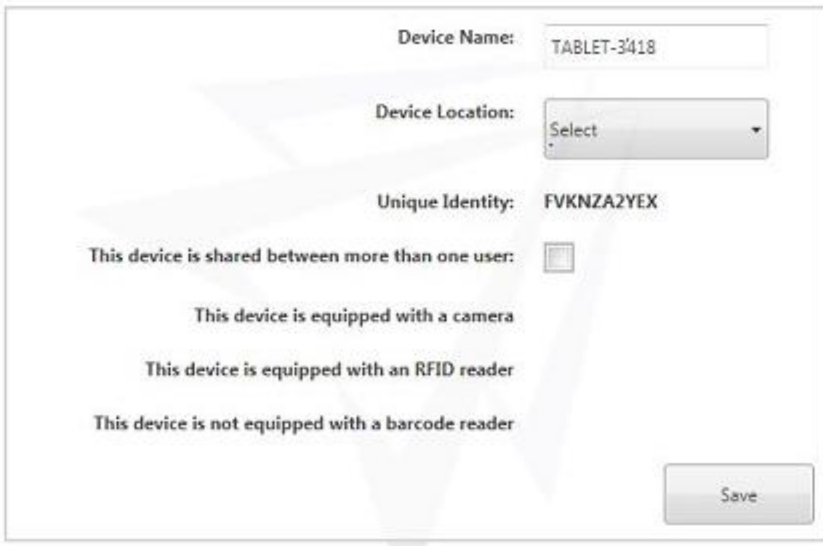
Once the user is ready to return to work, click the Back from Lunch icon .

At the end of the day, select the Sign Out icon. Depending on how the department is setup, a set of post-work questions may be asked and must be answered in order for the user to sign out. If any questions are answered negatively, a Warning Message will appear with instructions or the user may be stopped from signing out.

Once the user has signed out, click on the Home icon to return to the Main Menu. From the Main Menu the user can use the logout icon to exit the system.

System Information on the Tablet

The first time a device is used with the PROMPTT®PC/Tablet Application, the System Information screen will be displayed.

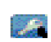


System Information screen

Enter the following information

> **Device Location** The location where the device will be used. Select a location from the drop-down list.
>
> **This device is shared between more than one user** If the device will be used by more than one user, click the check box. If more than one user is accessing the device, it will require a login before starting the PC App.

The remaining information is entered by the system.

The user can click on the System Information icon  to view this information at any time.

Checklists on the Tablet

Selecting a Checklist to Execute

Checklists can be viewed and executed from the PC/Tablet application.

From the Main menu, select the Checklist icon.

Use one or more of the filters to determine which of the checklists will be displayed. Leaving the filter blank will show all checklists.

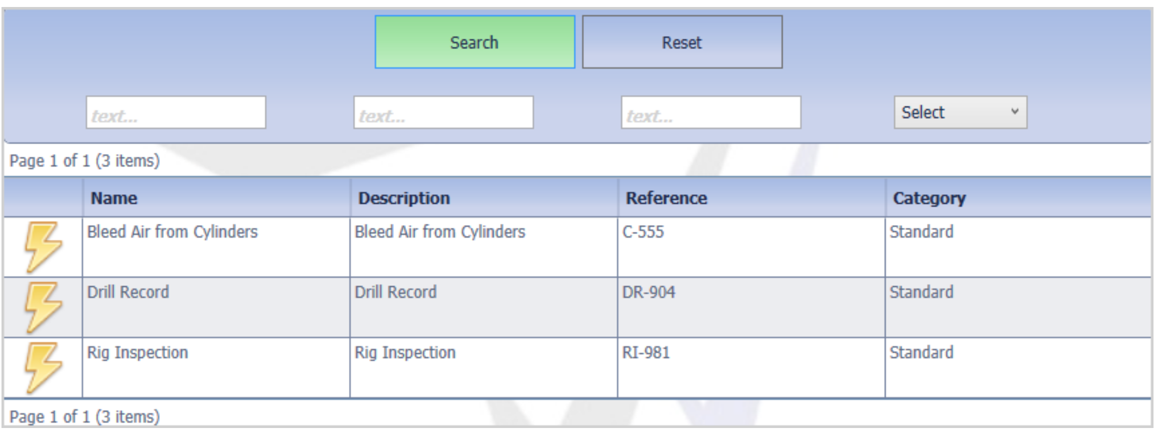
Enter a name or partial name of a checklist in the **Name** filter.

Enter a description or partial description of a checklist in the **Description** filter.

Enter a reference or partial reference in the **Reference** filter.

Select one or more categories from the drop-down list for the **Category** filter.

Click the Search button to display the results of the search.



	Name	Description	Reference	Category
	Bleed Air from Cylinders	Bleed Air from Cylinders	C-555	Standard
	Drill Record	Drill Record	DR-904	Standard
	Rig Inspection	Rig Inspection	RI-981	Standard

Checklist page

The last filter used is saved during a login session. When re-entering a search page, the data will be retained from the previous search.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order.

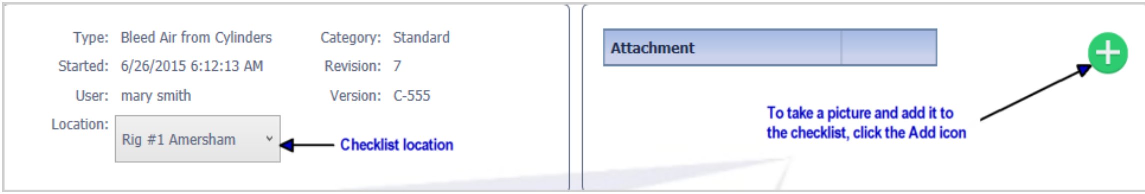
To clear the filters, click the Reset button. The Search button will need to be clicked to display the data.

Clicking the lightning bolt icon will display the Checklist Execution page.

Executing the Checklist

In the Detail pane of the checklist, the location will automatically default to the device's location. If a different location is desired, select a location from the drop-down list.

Click the Add icon for Attach in the Attachments pane to add any attachments to the checklist.

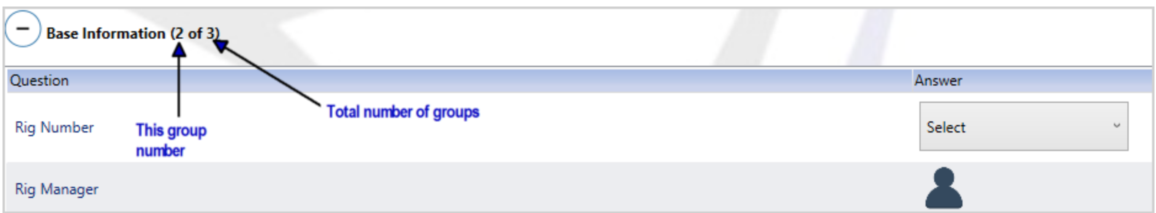


Detail Pane   Attachment pane

Groups on the Checklist

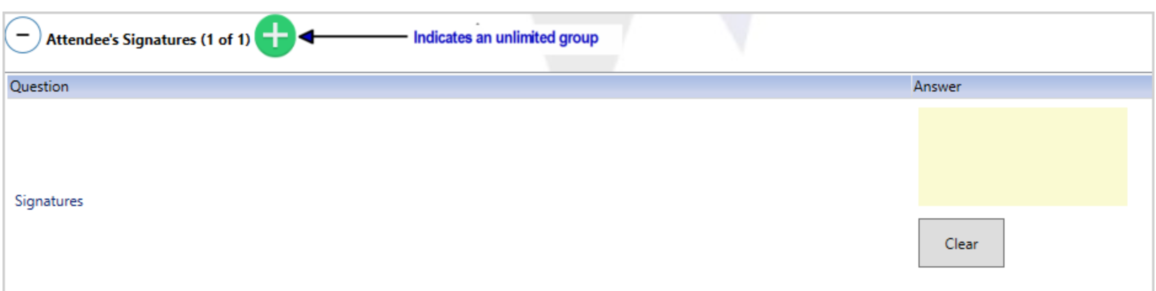
The checklist questions are displayed in groups.

Groups that have the Multi-group in the checklist template set to a value between 2 and 10 will display the group that many of times are called Limited Groups. There will be a group number indicator after each group, showing the group number out of the total number of groups.



Limited Group

Groups that have the Multigroup set to Unlimited will have the Add icon  after the group name. Clicking the Add icon will add the group to the checklist instance. As each group is added, the Add icon will then be moved to the last instance of the group. This allows the user to add the group to the checklist as many times as is necessary. There will be a group number indicator after each group, showing the group number out of the total number of groups.



Unlimited Group

Answering Questions

There are sixteen types of questions that can be asked on a checklist.

A **Confirm** question will display a checkbox with OK. Click the box for a positive answer.

A **Yes/No** question will display a radio button for Yes and a radio button for No. Select the correct response to the question.

A **Date** question will display a calendar when clicked. Use the arrows to move between months and years on the calendar to find the correct date. Click on the day to enter the date . A date can also be manually entered in the format *mm/dd/yyyy* where *mm* is the month, *dd* is the day and *yyyy* is the four-digit year.

A **Numeric** question will display a text box that will only accept numeric values. Enter the correct numeric value.

A **Text** question will display a text box that will accept alphanumeric values. Enter up to a 200-character answer.

A **List** question will display a drop-down list. Click on the correct element in the list to answer the question.

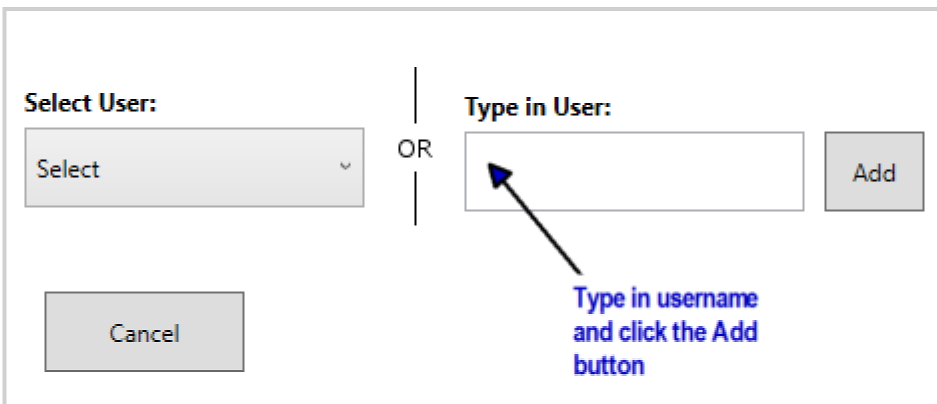
A **List-Multiple** question displays a drop-down list that will accept multiple answers. Mark one or more of the check boxes in front of each list element.

A **Location** question will display a drop-down list of locations.

A **Component** question displays a drop-down list of components for the location.

A **Signature** question displays a signature box. Use the mouse, stylus, or your finger to draw the signature.

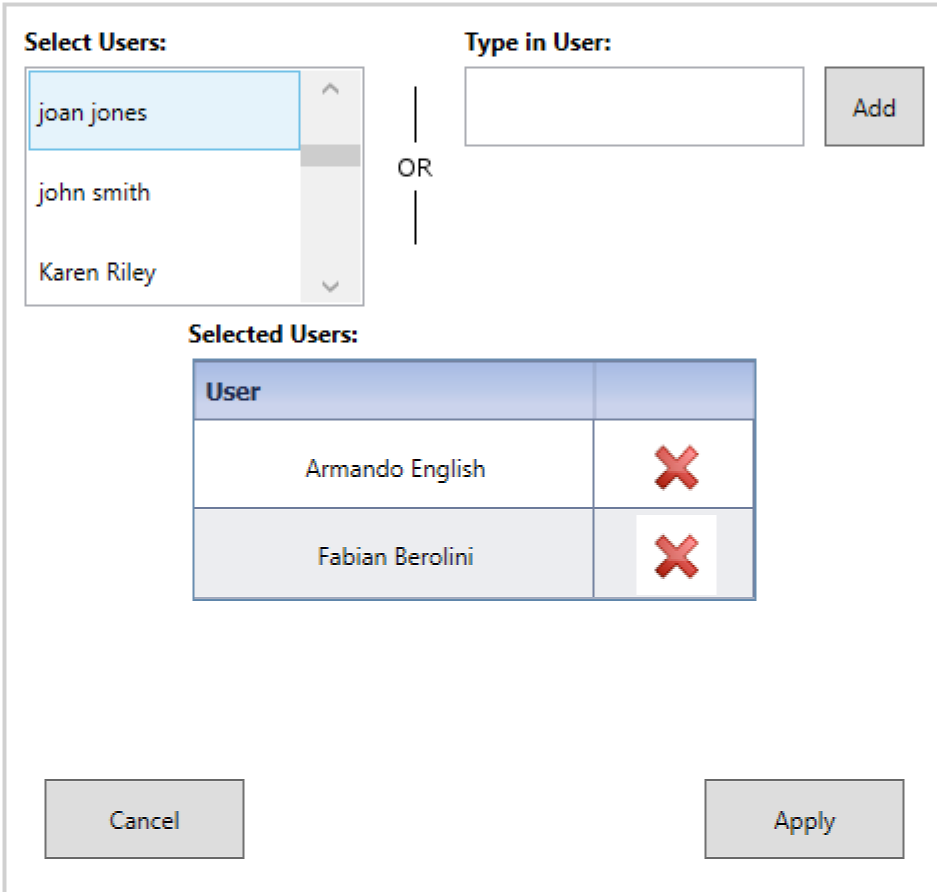
A **User** question display a drop-down list of users or allows the manual entry of a user.



Add User dialog box

Click on one user in the drop-down list to answer the question, type in the user name and click the Add button to manually enter the user, or click the Cancel button to return to the Checklist Execution page. Once the users have been applied, clicking the user icon will return to the Multi User dialog box and the users can be changed.

A **Multi-User** question display a drop-down list of users or allows the manual entry of a user.



Multi User dialog box

Click on one or more users in the drop-down list, or type in a user name and click the Add button to manually enter the user. Additional users can also be typed in, clicking the Add button after each user. If a user is mistakenly entered, click the Delete icon to the right of the user name in the Selected Users pane to remove the user. Click the Apply button to add the users or click the Cancel button to return to the Checklist Execution page without adding any users.

Once the users have been applied, clicking the user icon will return to the Multi User dialog box and the users can be changed.

An **Image** question displays an Add icon to add an image.

Click the Add icon for Add Image.

The Camera dialog box is displayed.

Camera dialog box

If there is more than one camera on the device, the Switch Camera button will toggle the device between the two cameras. Click the Take Photo button to take a photo, the Save button will become activated. Click the Save button to save the image or click the Cancel button to return to the Checklist Execution page without saving the image.

From the Checklist Execution page, the image can be deleted by click the Delete icon to the right of the image.

For an **Auto User** question there will be no question asked; the answer will default to the user answering the checklist and is not editable.

For an **Auto Date** Time question, there will be no question asked; the answer will default to the current date and time and is not editable.

For an **Auto Location** question, there will be no question asked; the answer will default to the handheld location and is not editable.

Mandatory questions on the checklist will have an asterisk (*) before the question. When all the mandatory questions are answered, the Complete button is enabled. The Complete button should not be clicked until all questions have been answered and reviewed; the answers can not be edited once the checklist is marked as complete.

Clicking the Complete button marks the checklist as complete and returns the user to the Checklist Execution page. Clicking the Cancel button will return the user to the Checklist Execution page without saving any answers.

JSAs on the Tablet

Selecting a JSA to Execute

JSAs can be viewed and executed from the PC/Tablet application.

From the Main menu, select the JSA icon.

Use one or more of the filters to determine which of the JSAs will be displayed. Leaving the filter blank will show all JSAs.

Enter a JSA or a partial JSA in the **JSA** filter.

Enter a description or partial description of a JSA in the **Description** filter.

Select one or more categories from the drop-down list for the **Category** filter.

Select one or more keywords from the drop-down list for the **Keyword** filter.

Enter a reference or partial reference in the **Reference** filter.

Click the Search button to display the results of the search.

JSA page

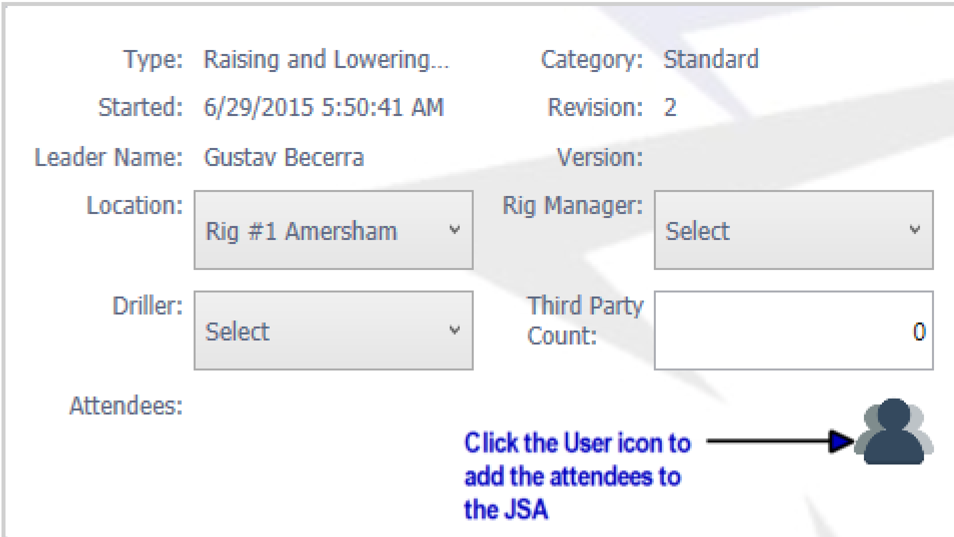
The last filter used is saved during a login session. When re-entering a search page, the data will be retained from the previous search.

Any of the columns can be used to sort the data. Click the column once to sort in ascending order, click it a second time to sort it in descending order.

To clear the filters, click the Reset button. The Search button will need to be clicked to re-display the data.

Clicking the lightning bolt icon will display the JSA Execution page.

Executing the JSA



JSA Detail pane

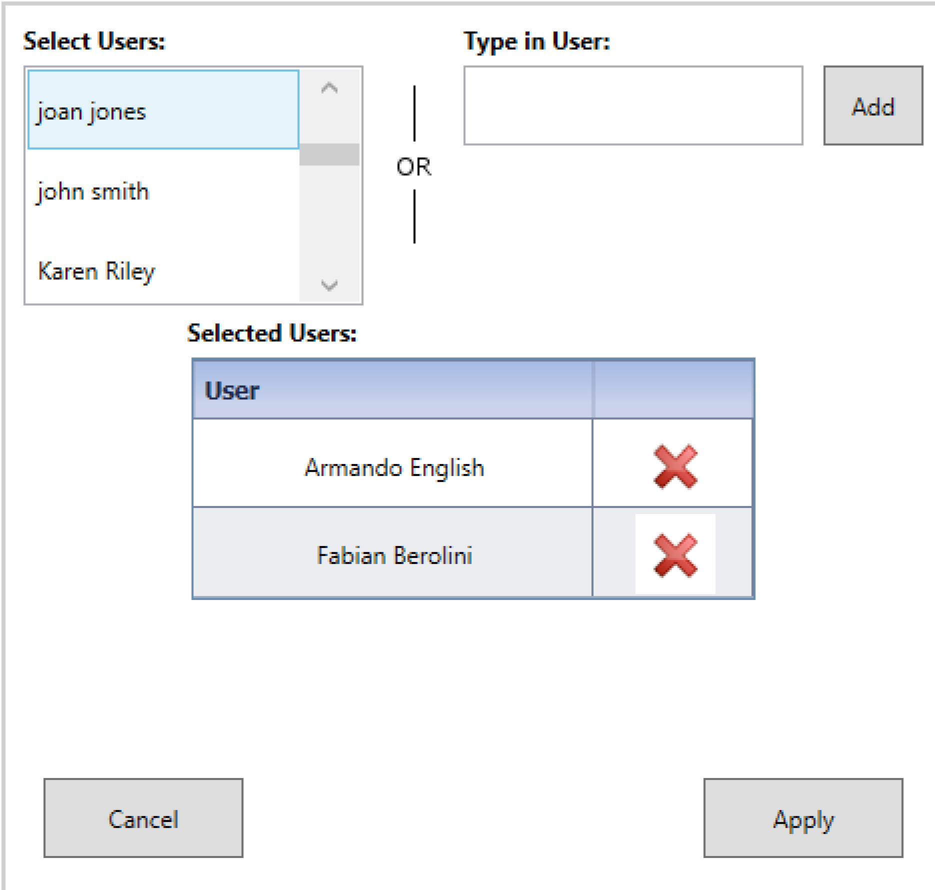
From the JSA Execution page, In the JSA Detail pane, the location will automatically default to the device's location in the JSA Detail pane. If a different location is desired, select a location from the drop-down list.

Select a Rig Manger from the drop-down list for the Rig Manager. Only Rig Managers assigned to the location of the JSA will be displayed.

Select a Driller from the drop-down list for the Driller. Only Drillers assigned to the location will be displayed.

Enter a third party count.

Click the User icon  to add the attendees to the JSA.



Multi User dialog box

Click on one or more users in the drop-down list or type in a user name and click the Add button to manually enter the user. Additional users can also be typed in, clicking the Add button after each user. If a user is mistakenly entered, click the Delete icon to the right of the user name in the Selected Users pane to remove the user. Click the Apply button to add the users or click the Cancel button to return to the Checklist Execution page without adding any users.

Once the users are applied, clicking the user icon will return to the Multi User dialog box and the users can be changed.

Adding Attachments

The Attachments pane is in the top right-hand corner of the JSA Execution page. Click the Add icon for Attachments in the Attachments pane to add any attachments to the JSA.

The Camera dialog box is displayed.

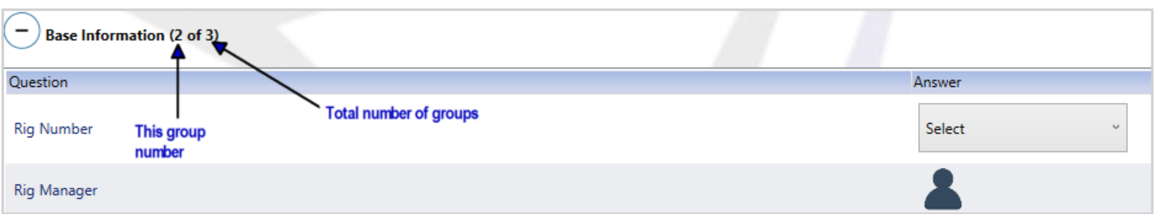
Camera dialog box

If there is more than one camera on the device, the Switch Camera button will toggle the device between the two cameras. Click the Take Photo button to take a photo, the Save button will become activated. Click the Save button to save the image or click the Cancel button to return to the Checklist Execution page without saving the image.

Groups on the JSA

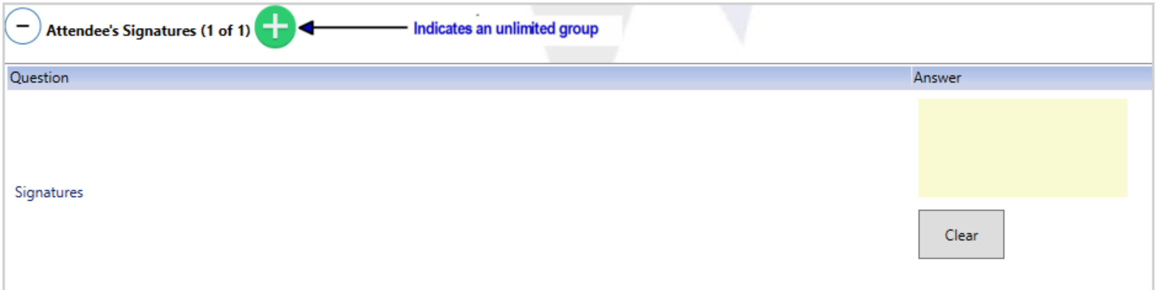
The JSA questions are displayed in groups.

Groups that have the Multi-group in the checklist template set to a value between 2 and 10 will display the group that many of times are called Limited Groups. There will be a group number indicator after each group, showing the group number out of the total number of groups.



Limited Group

Groups that have the Multigroup set to Unlimited will have the Add icon after the group name. Clicking the Add icon will add the group to the JSA instance. As each group is added, the Add icon will then be moved to the last instance of the group. This allows the user to add the group to the JSA as many times as is necessary. There will be a group number indicator after each group, showing the group number out of the total number of groups.



Unlimited Group

Answering the JSA Questions

There are sixteen types of questions that can be asked on a JSA. They are used the same way as in a checklist. Please see Answering Questions section of Checklists on the Tablet.

Mandatory questions on the JSA will have an asterisk (*) before the question. When all the mandatory questions are answered, the Complete button is enabled. The Complete button should not be clicked until all questions have been answered and reviewed; the answers can not be edited once the checklist is marked as complete.

Clicking the Complete button marks the JSA as complete and returns the user to the JSA Execution page. Clicking the Cancel button will return the user to the JSA Execution page without saving any answers.

Administration on the Tablet

The Administration menu allows the user to reset the database, recover the database, and view the log files.

Open Current Log File

The system maintains a log file of all activity on the PC App.

Click on the Admin icon .

The Admin menu is displayed.

Admin menu

Click the Open Current Log File icon

The log file is opened in a text editor.

Reset Data

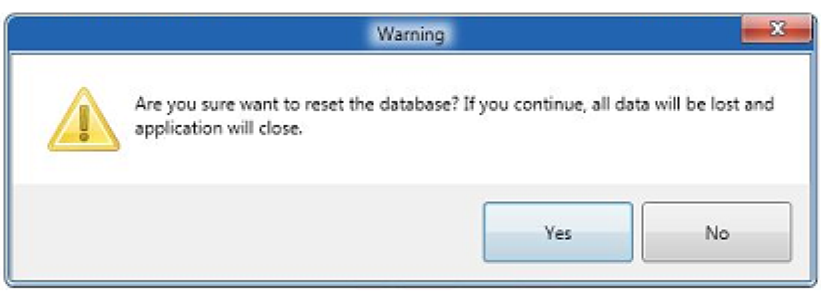
The Reset Data option will clear all of the data from the tablet. Any data that was on the tablet will be lost from the system.

Click on the Admin icon.

The Admin menu is displayed.

Click the Reset Data icon.

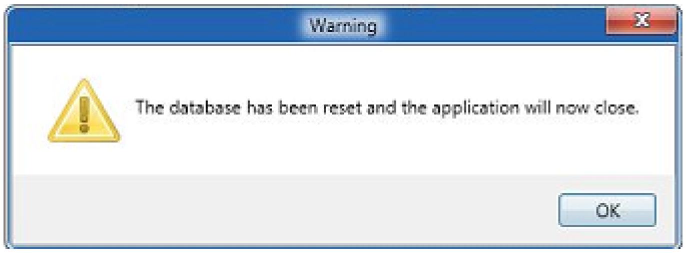
The Reset Data dialog box is displayed.



Reset Data dialog box

Click the Yes button to reset the database or click the No button to return to the Admin menu without resetting the data.

Answering “Yes’ will display the Confirmation dialog box.



Confirmation dialog box.

Click the OK button to continue with the Data Reset.

Recover Data

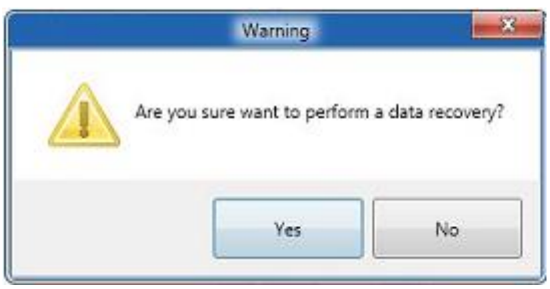
The recover data option will reset the data without losing any of the current data.

Click on the Admin icon.

The Admin menu is displayed.

Click the Recover Data icon.

The Recover Data dialog box is displayed.



Recover Data dialog box

Click the Yes button to recover the database or click the No button to return to the Admin menu without recovering the data.

Appendix A – Security Objects

Category	Sub-category	Security Object	Security Object	Grants or denies the user or role access
Core Processing	`			To the Core Processing in the web application.
	Dashboard Content			
		Dashboard Content Device Activity		To add the Device Activity content brick to the home page.
		Dashboard Content Favorites		Reserved for future use.
		Dashboard Content Reports		To add the Reports content brick to the home page.
		Dashboard Content Standard Favorites		To add the Standard Favorites content brick to the home page.
		Dashboard Content Subscription Activity		To add the Device Activity content brick to the home page.
	Handheld			
		Activate HH Form		To change a location with an inactive status to an active status in the Handheld application.
		Admin Menu		To the Admin menu on the Handheld
		Badge Setup Process		Reserved for future use.
		Camera Form		Reserved for future use.
		Camera Process		Reserved for future use.

		Change Location Process		To change the location of the Handheld
		Change User Location Process		To reassign the user's location on the Handheld.
		Change User Location Required		To prompt for confirmation when changing the location of a user on the Handheld
		Data Recovery Process		Reserved for future use.
		Database Reset Process		Reserved for future use.
		Date Time Picker Form		To the change the data and time in select modules on the Handheld
		Dynamic Menu Form		Reserved for future use.
		Enter Pin Form		Reserved for future use.
		Keyboard Form		To be able to use the keyboard on the login from in the Handheld application.
		Location List Form		Reserved for future use.
		Location Status Form		To location status drop-down lists when making a location active on the Handheld
		Login Form		To login to the Handheld
		Main Menu		To both the Primary menu and the Admin menu in the Handheld
		Message Form		Reserved for future use.
		Process Selection Form		Reserved for future use.
		Scanner Form		Reserved for future use.

		Status Form		Reserved for future use.
		Sync Form		Reserved for future use.
		Tag Scan Process		Reserved for future use.
		Time Spinner Form		Reserved for future use.
		User Add Picture Form		Reserved for future use.
		User Add Picture Process		To add a picture to a user through the Camera menu option in the Handheld
		User List Form		Reserved for future use.
		User Search.		Reserved for future use.
			Change User	Reserved for future use.
		User Setup Process		Reserved for future use.
		Wire Authentication Form		Reserved for future use.
		Wire Configuration Form		Reserved for future use.
		Wire Encryption Form		Reserved for future use.
		Wireless Networking Form		Reserved for future use.
		Wire Selection Form		Reserved for future use.
	PC Application			
		Admin Menu		To the Admin menu in the PC/Tablet Application.
		User Search		To the User page in the PC/Tablet Application.

			User Search Change	To assign tags and pictures to users in the PC/Tablet Application
	Report			
		Billing Summary		To run the Billing Summary report in the web application.
		Location Billing Detail		To run the Location Billing Detail report in the web application.
		Location Detail Summary		To run the Location Detail Summary report in the web application.
		Location Hierarchy		To run the Location Hierarchy report in the web application.
		Notifications Summary		To run the Notifications Summary report in the web application.
		Project Reporting		To run the Project Reporting report in the web application.
		Replication Sync Errors		To run the Replication Sync Errors report in the web application.
		Report Tester		To run the Report Tester report in the web application.
		Version List		To run the Version List report in the web application.
		Web Location Hierarchy		To run the Web Location Hierarchy report in the web application.
		Web User Info		To run the Web User Info report in the web application.
	Web			
		Admin Page		The Admin menu in the web application.
		Application Info		Reserved for future use.
		Attachment Detail		Reserved for future use.
		Attachment Search		To the Attachments page in the web application.

			Attachment Search Add	To add attachments through the Attachments page in the web application.
			Attachment Search Change	To view the attachment detail from the Attachments page in the web application.
			Attachment Search Delete	To delete the attachments from the Attachments page in the web application.
		Control Maintenance		Grants or denies the user or role access the Control Values Search page to in the web application.
			Add Control	To add control values to the PROMPTT® system.
			Change Control	To change control values in the PROMPTT® system.
			Delete Control	To delete control values in the PROMPTT® system.
		Create Locations		Reserved for future use.
		Date Filter		Reserved for future use.
		Detail Definition		To the Detail Definitions page in the web application.
			Detail Definition Add	To add detail definitions to the PROMPTT® system.
			Detail Definition Change	Reserved for future use.
			Detail Definition Delete	To delete detail definitions in the PROMPTT® system.
		Detail Update Rule Search		To the Work Order Update Rules page in the web application.
			Detail Update Rule Add	To add work order update rules to the PROMPTT® system.
			Detail Update Rule Change	To change work order update rules in the PROMPTT® system.

			Detail Update Rule Delete	To delete work order update rules in the PROMPTT® system.
		Download PC Application		To down the PC/Tablet Application from the Home page in the web application.
		Handheld Activity		To the Device Activity and Device Registration pages in the web application.
			Change Handheld Activity	To change the publication level or location of a Handheld in the Device Activity page.
			Delete Handheld Activity	To delete a device record from the Device Activity page.
		Home Page		To the Home page in the web application.
			Add Content	To add content bricks to their Home page in the web application.
			Open Dashboard	To open dashboards and change their current dashboard in the web application.
			Share Dashboard	To create and share dashboards with other users.
		List Type COST CATEGORY		To edit the list type COST CATEGORY in the supplemental lists of the web application.
		List Type PROJECT		To edit list type PROJECT in the supplemental lists of the web application.
		Location Advanced Search		Reserved for future use.
		Location Choice Lists		To the Location Choices page in the web application.
		Location Detail		Reserved for future use.
			Location Detail Add Detail	Reserved for future use.

			Location Detail Add Location Inventory	To change location detail definitions in the PROMPTT® system.
			Location Detail Edit Detail	Reserved for future use.
			Location Detail Edit Item	Reserved for future use.
			Location Detail Edit Location Inventory	To edit the location quantity from the Inventory tab of the Locations Details page in the web application.
		Location Detail Data Types		Reserved for future use.
		Location Detail Definitions		To the Location Detail Definitions page in the web application.
		Location Detail Types		Reserved for future use.
		Location Statuses		Reserved for future use.
		Location Summary		To the Location Search page in the web application.
			Add Location	To add locations to the PROMPTT® system.
			Change Location	To modify standard detail and the details of a locations.
		Location Template Detail		To the list of location templates in the Location Template page in the web application.
		Location Template Summary		To the Location Templates page in the web application.
		Location Types		Reserved for future use.
		Message Choice Lists		Internal Trigpoint Use only
		Message Definitions		Internal Trigpoint Use only
		Message Definitions Detail		Internal Trigpoint Use only

		Message Summary		Internal Trigpoint Use only
		Message Types		Internal Trigpoint Use only
		New Choice List Name		Reserved for future use.
		Notification Summary		To the Notifications Search page in the web application.
		Notification Types		To add, change, and delete the notification types in the Primary Lists of the web application.
		Primary Lists		To the Primary Lists page in the web application.
		Reports Page		To Report Designer page in the web application.
		Security Edit		To configure security in the Security page of the web application.
		Security View		To view security in the Security page of the web application.
		Subscription Maintenance		To the Subscriptions page in the web application.
			Manage Subscriptions Add Filter Selections	To add a filter to a subscription from the Subscriptions page in the web application.
			Manage Subscriptions Add Location Selection	Reserved for future use.
			Manage Subscriptions Add Type Selection	To add a notification type to a role in the web application.
			Manage Subscriptions Change Filter Selections	To change a filter for a subscription in the web application.
			Manage Subscriptions Change Location Selections	To change the location of a subscription in the web application.

			Manage Subscriptions Change Type Selection	Reserved for future use.
			Manage Subscriptions Delete Filter Selections	To delete a filter for a subscription in the web application
			Manage Subscriptions Delete Location Selection	Reserved for future use.
			Manage Subscriptions Delete Type Selection	To delete a notification type from a subscription in the web application.
		Supplemental List Items		To the Supplemental Lists Items page in the web application.
			Supplemental List Items Add	To add items to a supplemental list in the PROMPTT® system.
			Supplemental List Items Change	To change items of a supplemental list in the PROMPTT® system.
			Supplemental List Items Delete	To delete items from a supplemental list in the PROMPTT® system.
		Supplemental Lists		To the Supplemental Lists page in the web application.
			Supplemental Lists Add	To add supplemental lists to the PROMPTT® system.
			Supplemental Lists Change	To change supplemental lists in the PROMPTT® system.
		Translations		To the Translation Editor page in the web application.
		User Detail		To edit the user details and password in the Edit User dialog box in the web application.
			User Detail Change	To edit the user details in the Edit User dialog box in the web application.

			User Detail Change Password	Reserved for future use.
		User Detail Picture		To add, edit, or delete a picture of a user in the Edit User dialog box from the User Management page in the web application.
			User Detail Picture Add	To add a picture to a user in the Edit User dialog box from the User Management page in the web application.
			User Detail Picture Change	To change the picture of a user in the Edit User dialog box from the User Management page in the web application.
			User Detail Picture Delete	To delete a picture from a user in the Edit User dialog box from the User Management page in the web application.
		User Types		Reserved for future use.
		Users		To the User Management page in the web application.
			Add User	To add users to the PROMPTT® system.
			Change User	To change users in the PROMPTT® system.
			Change User Password	Reserved for future use.
			Disable User	Reserved for future use.
			Display Disabled Users	Reserved for future use.
		Users Change Password		Reserved for future use.
		User Change Roles		Reserved for future use.
		Web Login		To log into the web application.
		Application Programming Interface		To the Application Programming Interface of the PROMPTT® system.

Asset Tracking				To asset tracking in the web application.
	Handheld			
		Add Component Add Picture Form		Reserved for future use.
		Assign Parent Yes/No		To assign a parent to a component in the Handheld application.
		Associated Components Form		To transfer components that is associated with other components in the Handheld application.
		Change Component Location Process		To change a component's location from search component in the Handheld application.
		Choice List Form		Reserved for future use.
		Component Add Picture Process		Reserved for future use.
		Component Creation Process		To create a component in the Handheld application.
		Component Detail List Form		To the component detail definition drop-down list in the Handheld application.
		Component Edit Form		To edit a component in the Handheld application.
		Component Info Form		To view and edit the additional component information when searching components in the Handheld application.
		Component List Form		To see the list of components after executing a component search in the Handheld application.
		Component Search Form		To edit a component search in the Handheld application.
		Component Search Process		Reserved for future use.

		Component Status List Form		Reserved for future use.
		Component Status Review Form		To access the component status review form in the Handheld application.
		Component Tag Assignment Process		To assign a RFID tag to a component in the Handheld application.
		Component Tag Scan Process		Reserved for future use.
		Component Type List Form		Reserved for future use.
		Date Selection Form		To the calendar when creating a component in the Handheld application.
		Discreet Input Form		Reserved for future use.
		Landscape Message Form		Reserved for future use.
		Material Transfer Receive Process		To perform a material transfer of type receive in the Handheld application.
		Material Transfer Summary Form		To see the material transfer summary when performing a transfer of type receive in the Handheld application.
		Material Transfer Type List Form		Reserved for future use.
		Numeric Entry Form		Reserved for future use.
		Sub-Locations List Form		Reserved for future use.
	Report			
		Accounting Load List		To run the Accounting Load List report in the web application.
		Basic Load List		To run the Basic Load List report in the web application.

		Certification Summary		To run the Certification Summary report in the web application.
		Commission Verification		To run the Commission Verification report in the web application.
		Component Activity		To run the Component Activity report in the web application.
		Component Detail Summary		To run the Component Detail Summary report in the web application.
		Component History		To run the Component History report in the web application.
		Component List		To run the Component List report in the web application.
		Component Scan Summary		To run the Component Scan Summary report in the web application.
		Component Search		To run the Component Search report in the web application.
		Component Snapshot		To run the Component Snapshot report in the web application.
		Component Summary		To run the Component Summary report in the web application.
		Duplicate Component Summary		To run the Duplicate Component Summary report in the web application.
		E Number Report		To run the E Number Report in the web application.
		Inventory Audit Summary		To run the Inventory Audit Summary report in the web application.
		Load List		To run the Load List report in the web application.
		Morning Report		To run the Morning Report in the web application.
		Operating Days		To run the Operating Days report in the web application.

		User PDP Summary		To run the User PDP Summary report in the web application.
		Web Load List		To run the Web Load List report in the web application.
	Web			
		Add Attachment		Reserved for future use.
		Attachment Summary		Reserved for future use.
		Component Advanced Search		Reserved for future use.
		Component Choice Lists		To the Components Choices page in the web application.
		Component Detail		To add, remove, or mark as downloadable an attachment to a component or component type in the attachments tab in the Component Details page.
			Attachment Component	To add an attachment to a component in the web application.
			Attachment Component Type	To add an attachment to a component type in the web application.
			Mark for Download Component	To mark an attachment to a component for download to the Handheld.
			Mark for Download Component Type	To mark an attachment to a component type for download to the Handheld.
			Remove Attachment Component	To remove an attachment from a component in the web application.
			Remove Attachment Component Type	To remove an attachment from a component type in the web application.
		Component Detail Data Types		Reserved for future use.

		Component Detail Definitions		To the Component Detail Definitions page in the web application.
		Component Detail Types		Reserved for future use.
		Component Search		To the Component Search page in the web application.
			Add Component	To add components in the web application.
			Change Component	To change the details of a components in the web application.
			View Sub Location	To view a component's sub location from the Component Search page in the web application.
		Component Statuses		Reserved for future use.
		Component Summary		Reserved for future use.
		Component Template Detail		Reserved for future use.
		Component Template Summary		Grants or denies the user or role access the Component Template page to in the web application.
		Component Types		Reserved for future use.
		Create Components		Reserved for future use.
		GPS Maps		Reserved for future use.
		Operating Details		To the Operating Days page in the web application.
			Operating Details Change Additional Information	To change information in the Additional Operating Information pane of the Operating Days page in the web application.
			Operating Details Change Component Information	To change information in the Component Operating Information pane of the Operating Days page in the web application.

			Operating Details Change Standard Information	Reserved for future use.
		Report Viewer		To the Report Viewer page in the web application.
		Upload Attachment		To upload an attachment in the web application.
		Well Data Detail		Reserved for future use.
		Well Data Search		To the Well Data page in the web application.
		Well Time Code Data Detail		Reserved for future use.
		Well Time Code Data Search		Reserved for future use.
Transfers				To material transfers in the web application.
	Handheld			
		Material Transfers Ship Process		To material transfers, material transfer type ship, in the Handheld application.
		Ship Via List Form		Reserved for future use.
		Stock Take Process		Reserved for future use.
	Report			
		Component Transfer Summary		To run the Component Transfer Summary report in the web application.
		In Transit Summary		To run the In Transit Summary report in the web application.
		Location Transfer Summary		To run the Location Transfer Summary report in the web application.

		Material Transfer Detail		To run the Material Transfer Detail report in the web application.
		Material Transfer Summary		To run the Material Transfer Summary report in the web application.
		Movement Summary		To run the Movement Summary report in the web application.
	Web			
		Material Transfer Type		Reserved for future use.
		Shipping Providers		Reserved for future use.
		Web Material Transfer Add Component		Reserved for future use.
		Web Material Transfer Add/Edit		Reserved for future use.
		Web Material Transfer Search		To the Material Transfer Search page.
			Web Material Transfer Search Add	To add a material transfer in the web application.
Tasking				To task information and processing in the web application.
	Dashboard Content			
		Dashboard Content Task Activity		To add the Task and the Task Activity content brick to the home page of the web application.
		Dashboard Content Task List Activity		To add the Task List Activity content brick to the home page of the web application.
	Handheld			

		Allow View All Task Lists		To view all task list regardless of role in the Handheld application. When this is set to No, the user can only view tasks assigned to their own roles.
		Confirm Work group Form		To tasks that have confirmation text in the Handheld application.
		Master Tasks Form		Reserved for future use.
		Reject Code Form		To the reject code drop-down list in the Handheld application.
		Skip Scan		To skip scanning a component when completing a task in the Handheld application.
		Task Component Form		To the list of components on the selected task in the Handheld application.
		Task Component Image Form		To view a component image while completing a task in the Handheld application.
		Task Component More Info Form		To additional information about a task when completing a task in the Handheld application.
		Task Instruction Types		To on demand tasks in the Handheld application.
		Task List Form		To the l task drop-down list upon initial entry into tasking in the Handheld application.
		Task More Info Form		To access the Info button for a task when completing a task in the Handheld application.
		Task Work Groups Form		To tasks that have confirmation text in the Handheld application.
		Tasking Process		To tasking in the Handheld application.
	Report			
		Compliance Report		To run the Compliance Report in the web application.

		Component Compliance		To run the Component Compliance report in the web application.
		Component Compliance Detail		To run the Component Compliance Detail report in the web application.
		Component Task List Tree Summary		To run the Component Task List Tree Summary report in the web application.
		Component Task tree		To run the Component Task tree report in the web application.
		Component Type Compliance		To run the Component Type Compliance report in the web application.
		Customer Compliance Report		To run the Customer Compliance Report in the web application.
		Daily Maintenance Checks		To run the Daily Maintenance Checks report in the web application.
		Deficiency-Non Conformance		To run the Deficiency-Non Conformance report in the web application.
		FE Compliance Report		To run the FE Compliance Report in the web application.
		Instruction Assignment		Reserved for future use.
		Instruction Details		To run the Instruction Details report in the web application.
		Instruction Usage		To run the Instruction Usage report in the web application.
		Issue and Compliance Summary		To run the Issue and Compliance Summary report in the web application.
		Issue Detail		To run the Issue Detail report in the web application.
		Location Compliance		To run the Location Compliance report in the web application.

		Location Scan Compliance		To run the Location Scan Compliance report in the web application.
		Maintenance Parameters		To run the Maintenance Parameters report in the web application.
		Maintenance Plan		To run the Maintenance Plan report in the web application.
		Maintenance Plan Sub		To run the Maintenance Plan Sub report in the web application.
		Maintenance Report		To run the Maintenance Report in the web application.
		Maintenance Report Detail		To run the Maintenance Report Detail report in the web application.
		Maintenance Report Summary		To run the Maintenance Report Summary report in the web application.
		Maintenance Summary		To run the Maintenance Summary report in the web application.
		Monthly Maintenance Summary		To run the Monthly Maintenance Summary report in the web application.
		Motor Book		To run the Motor Book report in the web application.
		Motor Book Demo		To run the Motor Book Demo report in the web application.
		Motor Book History		To run the Motor Book History report in the web application.
		Motor Book New		To run the Motor Book New report in the web application.
		Motor Book Parent		To run the Motor Book Parent report in the web application.
		Motor Book TL		To run the Motor Book TL report in the web application.
		Mud Pump Book		To run the Mud Pump Book report in the web application.

		Scan Compliance		To run the Scan Compliance report in the web application.
		Scan Compliance Detail		To run the Scan Compliance Detail report in the web application.
		Summary Compliance Report		To run the Summary Compliance Report in the web application.
		Task Check List Summary		To run the Task Check List Summary report in the web application.
		Task List Summary		To run the Task List Summary report in the web application.
		Task List Tree Summary		Reserved for future use.
		Task Review		To run the Task Review report in the web application.
		Task Summary		To run the Task Summary report in the web application.
		Task Tree		To run the Task Tree report in the web application.
		Work Time and Compliance Summary		To run the Work Time and Compliance Summary report in the web application.
		Work Time Detail		To run the Work Time Detail report in the web application.
		Work Time Summary		To run the Work Time Summary report in the web application.
	Web		`	
		Instruction Assignments		To the Task Assignment page in the web application.
		Instruction Choice Lists		To the Instruction Choices page in the web application.
		Instruction Detail		Reserved for future use.
		Instruction Maintenance		Reserved for future use.

		Instruction Maintenance Tree		Reserved for future use.
		Instruction Summary		To view the Instruction Search page in the web application and to add or change instructions.
			Add Instruction	To add instructions in the web application.
			Change Instruction	To change instructions in the web application.
		Instruction Types		Reserved for future use.
		Maintenance Plan Types		Reserved for future use.
		New Plan Name		Reserved for future use.
		Reject Code Types		Reserved for future use.
		Reject Codes		Reserved for future use.
		Response Lists		Reserved for future use.
		Response Types		Reserved for future use.
		Select Image		Reserved for future use.
		Select Instruction		Reserved for future use.
		Task Detail		Reserved for future use.
		Task List Formatting		Reserved for future use.
		Task Profile Add/Edit		Reserved for future use.
		Task Profile Detail		Reserved for future use.
		Task Profile Summary		To the Task Profile page in the web application.

		Task Profile types		Reserved for future use.
		Task Summary		To the Task List Search page in the web application.
		Task Summary-Full Screen		Reserved for future use.
Time Compliance				To time compliance module in the web application.
	Dashboard Content			
		Dashboard Content Time Attendance Activity		To add the Time Attendance content brick to the home page.
	Handheld			To in the Handheld application.
		Manage Time and Attendance Process		To the Meal Sheet menu option in the Handheld application.
		Shift Action Form		To the Meal Sheet menu option in the Handheld application.
		Shift Review Form		To Approve a meal sheet in the Handheld application.
		Time Capture Shift		Reserved for future use.
		Time Capture Timecard		Reserved for future use.
	Report			.
		Payroll Data by Day		To run the Payroll Data by Day report in the web application.
		Shift Override Summary		To run the Shift Override Summary report in the web application.
		Shift Penalty Summary		To run the Shift Penalty Summary report in the web application.
		Time and Attendance Export		To run the Time and Attendance Export report in the web application.

		Time and Attendance Summary		To run the Time and Attendance Summary report in the web application.
		Time Period Payroll Data		To run the Time Period Payroll Data report in the web application.
		Time Sheet Audit Detail		To run the Time Sheet Audit Detail report in the web application.
	Web			
		Hours of Service Search		To the Hours of Service page in the web application.
		Hours of Service Time Log Search		To the Hours of Service Daily Log page in the web application.
			Add Time Log	Reserved for future use.
			Change Time Log	Reserved for future use.
			Delete Time Log	Reserved for future use.
		Meal Sheet		To the Meal Sheet page in the web application.
			Add Shift	To add a shift for meal sheets in the web application.
			Approve Shift	To approve a shift for meal sheets from the in the web application.
			Change Shift	To change a shift for meal sheets in the web application.
			Reject Shift	Reserved for future use.
		Pre/Post Trip Search		To the Pre/Post Trip Search page in the web application.
		Shift Designation Detail		To the Edit Shift Designation dialog box in the web application.

			Shift Designation Detail Add	Reserved for future use.
			Shift Designation Detail Change	To change a shift designation in the web application.
			Shift Designation Detail Delete	To delete a shift designation from the PROMPTT® system.
		Time and Attendance Search		To the Meal Sheet Summary page in the web application.
			Add Shift	To add shift from the Meal Sheet Summary page in the web application.
			Approve Shift	To approve a shift from the Meal Sheet Summary page in the web application.
			Change Shift	To change a shift from the Meal Sheet Summary page in the web application.
			Reject Shift	To reject a shift from the Meal Sheet Summary page in the web application.
Job Safety				To Job Safety in the web application and the PC/Tablet application.
	Dashboard Content			
		Dashboard Content Safety Activity		To add the Recent Safety Activity content brick to the home page.
	Handheld			
		Camera Process		To take a picture with the camera in the Handheld application.
		Checklist Process		To execute a checklist in the Handheld application.

		Checklist Question Form		To answer questions on a checklist in the Handheld application.
		Checklist Summary Form		To select a checklist to process in the Handheld application.
		JSA Entry Form		To enter a JSA in the Handheld application.
		JSA Information Form		To the JSA information in the Handheld application.
		JSA Review Process		Reserved for future use.
		JSA Review Summary Form		Reserved for future use.
		JSA Search		To search for JSAs in the Handheld application.
		JSA Search Process		Reserved for future use.
		JSA Summary Form		Reserved for future use.
		JSA Tag Assignment Form		To Assign tags to JSAs in the Handheld application.
		JSA Tag Assignment Process		Reserved for future use.
		*Observation Comments		Reserved for future use.
		*Observation Detail Selection		To enter the detail information for the observation in the Handheld application.
		*Observation Entry		To enter an observation in the Handheld application.
		Observation List		To the list of observation when reviewing observation in the Handheld application.
		Observation Review Process		To in the Handheld application.
		*Observation Section Selection		To select the area for the observation in the Handheld application.

		*Observation Summary		To the completion screen when entering an observation in the Handheld application. When this is turned off the user will not have access to observations.
		*Operation Event Process		Reserved for future use.
		Operation Event Summary Form		Reserved for future use.
		Process JSA		To JSAs in the Handheld application.
		Process Meeting		To Meetings in the Handheld application.
		Process Observation Cards		Reserved for future use.
		Stop Card Comment Form		To add comments when entering a stop card in the Handheld application.
		*Stop Card Process		To stop cards in the Handheld application.
		*Stop Card Select Area Form		To select the area when entering a stop card in the Handheld application.
		*Stop Card Select Safety Form		To select whether safe or at risk for the stop card n the Handheld application.
		*Stop Card Summary Form		To in the Handheld application.
	PCApplication			
		JSA Search		To the JSA page in the PC/Tablet Application
			Execute JSA	To execute a JSA from the JSA page in the PC/Tablet Application
	Report			

		Daily Safety Recap		To run the Daily Safety Recap report in the web application.
		Daily Safety Summary		To run the Daily Safety Summary report in the web application.
		Observation Card Data		To run the Observation Card Data report in the web application.
		Observation Card Summary		To run the Observation Card Summary report in the web application.
		Observation Dashboard		To run the report in the web application.
		Observation Summary		To run the Observation Summary report in the web application.
		Safety Dashboard		To run the Safety Dashboard report in the web application.
		Safety Detail		To run the Safety Detail report in the web application.
		Safety Summary		To run the Safety Summary report in the web application.
	Web			
		Checklist		To the Checklists page in the web application.
		Checklist Detail		To add a new work order, add an existing work order, or remove work orders from the Checklist dialog box in the web application.
			Checklist Detail Add New Work Order	To create a new work order for a checklist from the Checklist dialog box in the web application.
			Checklist Detail Add to Existing Work Order	To add an existing work order to a checklist from the Checklist dialog box in the web application.
			Checklist Detail Remove Work Order Association	To remove a work order from a checklist from the Checklist dialog box in the web application.
		Checklist Execution Search		To the Checklist Execution page in the web application.

			Checklist Execution	To execute a checklist in the web application.
		Checklist Template Maintenance		To add and edit checklist templates from the Checklist Templates dialog box in the web application.
			Checklist Template Full Edit	To add a checklist template in the web application.
			Checklist Template Limited Edit	Reserved for future use.
		Checklist Template Rules		To add dependency rules to a checklist template in the web application.
			Checklist Template Rules Change	To add dependency rules to a checklist template in the web application.
		Checklist Template Search		To the Checklist Templates page in the web application.
			Checklist Template Search Add	To add a checklist template to the PROMPTT® system in the web application.
			Checklist Template Search Change	To change a checklist template in the web application.
			Checklist Template Search Copy	To copy a checklist template in the web application.
			Checklist Template Search Delete	To delete a checklist template in the web application.
		JSA Management Search		To the JSA Management page in the web application.
			Add JSA	To add a JSA to the PROMPTT® system in the web application.
			Change JSA	To change a JSA in the web application.

			Delete JSA	To delete a JSA in the web application.
		JSA Search		To the JSAs page in the web application.
		Meeting		To the Meetings page in the web application.
		Observation Card Search		To the Observation Cards page in the web application.
		Operational Event Search		To the Operational Events page in the web application.
		Safety Dashboard		To add the Recent Safety Activity content brick to the Home page.
		Stop Card Detail		To edit the status, comment or solution of a stop card from the Stop Card dialog box in the web application.
			Stop Card Detail Change	To edit the comment or solution of a stop card from the Stop Card dialog box in the web application.
			Stop Card Detail Invalid	To mark a stop card from the Stop Card dialog box as invalid in the web application.
			Stop Card Detail Valid	To mark a stop card from the Stop Card dialog box as valid in the web application.
		Stop Card Search		To the Stop Cards page in the web application.
			Stop Card Search Change Invalid	Reserved for future use.
			Stop Card Search Change Valid	Reserved for future use.
			Stop Card Search View Invalid	To view invalid stop cards in the web application.

			Stop Card Search View Pending	To view pending stop cards in the web application.
			Stop Card Search View Valid	To view valid stop cards in the web application.
Checklists				To search and execute Checklists in the web application and PC/Tablet application.
	Handheld			
		Checklist Process		To execute a checklist in the Handheld application.
		Checklist Question Form		To answer questions on a checklist in the Handheld application.
		Checklist Summary Form		To select a checklist to process in the Handheld application.
	PCApplication			
		Checklist Execution Search		To search checklists in the PC/Tablet Application
			Checklist Search Execute	To execute a checklist in the PC/Tablet Application
	Web			
		Checklist		To the Checklists page in the web application.
		Checklist Detail		To add a new work order, add an existing work order, or remove work orders from the Checklist dialog box in the web application.
			Checklist Detail Add New Work Order	To create a new work order for a checklist from the Checklist dialog box in the web application.
			Checklist Detail Add to Existing Work Order	To add an existing work order to a checklist from the Checklist dialog box in the web application.

			Checklist Detail Remove Work Order Association	To remove a work order from a checklist from the Checklist dialog box in the web application.
		Checklist Execution Search		To the Checklist Execution page in the web application.
			Checklist Execution	To execute a checklist in the web application.
		Checklist Template Maintenance		To the Checklist Templates dialog box in the web application.
			Checklist Template Full Edit	To add a checklist template in the web application.
			Checklist Template Limited Edit	Reserved for future use.
		Checklist Template Rules		To add dependencies to a checklist template in the web application.
			Checklist Template Rule Change	To change dependencies to a checklist template in the web application.
		Checklist Template Search		To the Checklist Templates page in the web application.
			Checklist Template Search Add	To add a checklist template to the PROMPTT® system in the web application.
			Checklist Template Search Change	To change a checklist template in the web application.
			Checklist Template Search Copy	To copy a checklist template in the web application.
			Checklist Template Search Delete	To delete a checklist template in the web application.
Work Orders				To work orders in the web and PC/Tablet applications

	Dashboard Content			
		Dashboard Content Work Order Activity		To add the Work Orders content brick to the home page.
			Add Work Order	To create a work order from the Work Order content brick on the Home page.
	Handheld			
		Work Order Create Process		To create a work order in the Handheld application.
		Work Order Description Form		To create a work order description in the Handheld application.
		Work Order Edit Form		To view work order details in the Handheld application.
		Work Order Edit Process		Reserved for future use.
		Work Order Item Edit Form		To add, change, delete, or mark as used the inventory items on a work order in the Handheld application.
		Work Order Procedure Edit Form		To add, change, delete, or mark as done the completion steps on a work order in the Handheld application.
		Work Order Search Process		Reserved for future use.
		Work Order Search Results Form		To in the Handheld application.
		Work Order Summary Form		Reserved for future use.
		Work Order Tasking Form		Reserved for future use.
	PCApplication			
		Work Order Search		Reserved for future use.

	Report			
		Work Order Compliance		To run the Work Order Compliance report in the web application.
		Work Order Compliance Summary		To run the Work Order Compliance Summary report in the web application.
		Work Order Compliance User		To run the Work Order Compliance User report in the web application.
	Web			
		Work Order Completion		To Close or Complete work order in the web application.
			Work Order Completion Add Invoice	Reserved for future use.
			Work Order Completion Link	To complete a work order from the Work Order dialog box in the web application.
			Work Order Completion Add Detail Link	Reserved for future use.
			Work Order Completion Add Note Link	Reserved for future use.
			Work Order Completion Change Completion Link	Reserved for future use.
			Work Order Completion Don't allow in-line editing of Detail	Reserved for future use.
			Work Order Completion Complete Button	Reserved for future use.

			Work Order Completion Delete Completion Link	Reserved for future use.
			Work Order Completion Delete Detail Link	Reserved for future use.
			Work Order Completion Done Checkbox	Reserved for future use.
			Work Order Completion Remove Invoice	Reserved for future use.
		Work Order Create		To add work order in the web application.
			Work Order Create Add Link	Reserved for future use.
		Work Order Maintenance		To edit a work order in the web application.
			Work Order Maintenance Add Attachment Link	To add an attachment to an existing work order in the web application.
			Work Order Maintenance Add Invoice	To add an invoice to an existing work order in the web application.
			Work Order Maintenance Add Completion Link	To add an invoice to an existing work order in the web application.
			Work Order Maintenance Add Component Link	To add a component to an existing work order in the web application.
			Work Order Maintenance Add Detail Link	To add a completion step to an existing work order in the web application.
			Work Order Maintenance Add Item Link	To add an inventory item to an existing work order in the web application.

			Work Order Maintenance Add Note Link	To add a note to an existing work order in the web application.
			Work Order Maintenance Add Notification Link	To add a notification to an existing work order in the web application.
			Work Order Maintenance Approve Icon	To the Close button for a work order in the web application.
			Work Order Maintenance Cancel Button	To the Cancel button for a work order in the web application.
			Work Order Maintenance Change Completion Link	To edit an invoice on an existing work order in the web application.
			Work Order Maintenance Change Detail Link	To change a completion step of an existing work order in the web application.
			Work Order Maintenance Change Work Order Header	Reserved for future use.
			Work Order Maintenance Change Item Link	To edit an inventory item on an existing work order in the web application.
			Work Order Maintenance Complete Button	To the Complete button for a work order in the web application.
			Work Order Maintenance Copy button	To copy an existing work order in the web application.
			Work Order Maintenance Delete Attachment Link	To delete an attachment from a work order in the web application.
			Work Order Maintenance Delete Completion Link	To delete a completion step from a work order in the web application.

			Work Order Maintenance Delete Component Link	To delete a component from a work order in the web application.
			Work Order Maintenance Delete Detail Link	To delete a completion step from a work order in the web application.
			Work Order Maintenance Delete Item Link	To delete an inventory item from a work order in the web application.
			Work Order Maintenance Notification Link	To delete a notification from an existing work order in the web application.
			Work Order Maintenance Done Checkbox	To mark a completion step as Done in a work order in the web application.
			Work Order Maintenance Hold Button	To the Hold button in a work order in the web application.
			Work Order Maintenance Item Used Checkbox	To mark an inventory item as used on a work order in the web application.
			Work Order Maintenance Remove Invoice	To delete the invoice attachment in a work order in the web application.
			Work Order Maintenance Re-Open Button	To the Open button in a work order in the web application.
		Work Order Search		To the Work Orders page in the web application.
			Work Order Search Add Link	To add a work order from the Work Order page in the web application.
			Work Order Search Approve Icon	Reserved for future use.
			Work Order Search Complete Icon	To complete a work order from the Work Order page in the web application.

			Work Order Search Copy Icon	To copy a work order from the Work Order page in the web application.
Hours of Service				Reserved for future use.
Time Capture				To the Time Capture module in the web and PC/Tablet Application.
	Dashboard Content			
		Dashboard Content Time Capture Activity		To add the Time Capture content brick to the home page.
	Handheld			
		TimeCard Daily Summary Form		To the daily summary in the Handheld application.
		TimeCard End Time form		To enter an end time when the shift runs over in the Handheld application.
		TimeCard Note Form		Reserved for future use.
		TimeCard Questions Form		To pre-work and post-work questions in the Handheld application.
		TimeCard Shift Form		To start and update shifts in the Handheld application.
		TimeCard Shift Parameters Form		Reserved for future use.
		TimeCard Shift Process		Reserved for future use.
		TimeCard TimeLogs Form		To view the time logs in the Handheld application.
		TimeCard Work code Form		To change work codes for a user during a shift in the Handheld application.

	PCApplication			
		Time Capture Shift		To time capture shifts in the PC/Tablet application.
		Time Capture Time Card		To entering an individual time card in the PC/Tablet application.
	Web			
		Department Search		To the Departments page in the web application.
			Department Search Add	To add a department to the PROMPTT® system.
			Department Search Change	To change a department in the web application.
			Department Search Delete	To delete a department from the PROMPTT® system.
		Holidays Search		To the Holidays page in the web application.
			Holidays Search Add	To add a holiday to the PROMPTT® system.
			Holidays Search Change	To change a holiday in the web application.
			Holidays Search Delete	To delete a holiday from the PROMPTT® system.
		Pay Period Weeks Search		To the Pay Period Weeks page in the web application.
			Add Pay Period	To add a pay period to the PROMPTT® system.
		Shift Designation Detail		To the Edit Shift Designation dialog box in the web application.
			Shift Designation Detail Add	Reserved for future use.

			Shift Designation Detail Change	To change a shift detail in the web application.
			Shift Designation Detail Delete	To delete a shift detail from the PROMPTT® system.
		Shift Designation Search		To the Sift Designations page in the web application.
			Shift Designation Search Add	To add a shift designation to the PROMPTT® system.
			Shift Designation Search Change	To modify a shift designation in the web application.
			Shift Designation Search Delete	To delete a shift designation from the PROMPTT® system.
		Time Card Detail		Reserved for future use.
			Add Time	Reserved for future use.
			Approve Time	Reserved for future use.
			Change Time	Reserved for future use.
		Time Card Individual		To enter time cards individually in the web application. Please note that the individual must also be assigned to a department that allows individual entry in order to enter individual time cards in the web application.
			Change Project Code/Cost Category	Reserved for future use.
		Time Card Payroll Admin		To the Payroll Admin page in the web application.
		Time Card Summary		To Time Card Approval menu option in the web application.

			Time Card Add	Reserved for future use.
			Add Time Card	Reserved for future use.
			Time Card Change	Reserved for future use.
			Time Card Delete	Reserved for future use.
			Generate Weekly Summary Category	Reserved for future use.
		Time Card Weekly Detail		Reserved for future use.
			Approve Time	Reserved for future use.
		Work Tasks Detail		The details of a work task in the Edit Work Tasks dialog box.
			Work Tasks Detail Allow Drawing Change	To allow a drawing change for a work task in the web application.
			Work Tasks Detail Change	To change the details of a work task from the Edit Work Tasks dialog box in the web application.
		Work Task Search		To the Work Task page in the web application.
			Work Task Add	To add a work task to the PROMPTT® system.
Inventory Items				To inventory items in the web application.
	Handheld			
		Item Category List Form		Reserved for future use.
		Item Info Form		To view the item information when adjusting inventory in the Handheld application.

		Item List Form		To view the list of items after executing an item search in the Handheld application.
		Item Material Transfer Process		Reserved for future use.
		Item Search Form		Reserved for future use.
		Item Search Process		To search for items in the Handheld application.
		Item Tag Assignment Process		To assign tags to an inventory item in the Handheld application.
		Item Type List Form		Reserved for future use.
	Web			
		Inventory Detail		To the Inventory Detail page in the web application.
			Inventory Detail Add Attachment	To add an attachment to an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Add Detail	To add a detail to an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Add Location Inventory	To add location inventory amount to an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Change Attachment	To change an inventory item attachment from primary to not primary and vice a versa.
			Inventory Detail Edit Detail	To edit the details of an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Edit Item	To edit the standard details of an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Edit Location Inventory	To edit the standard details of an inventory item from the Inventory Detail page in the web application.

			Inventory Detail Delete Attachment	To delete an attachment of an inventory item from the Inventory Detail page in the web application.
			Inventory Detail Attachment Mark for Download	To mark an attachment of an inventory item for download to the Handheld from the Inventory Detail page in the web application.
		Inventory Search		To the Inventory page in the web application.
		Item Detail		To add a detail to an inventory item in the Edit Item dialog box in the web application.
			Item Detail Change	To add or change a detail of an inventory item in the Edit Item dialog box in the web application.
		Item Detail Attachment		To add, edit and remove an attachment to an inventory item from the Edit Item dialog box in the web application.
			Item Detail Attachment Add	To add an attachment to an inventory item from the Edit Item dialog box in the web application.
			Item Detail Attachment Change	To change an attachment of an inventory item from the Edit Item dialog box in the web application.
			Item Detail Attachment Delete	To delete an attachment of an inventory item from the Edit Item dialog box in the web application.
			Item Detail Attachment Mark for Download	To mark an attachment of an inventory item for download to the Handheld from the Edit Item dialog box in the web application.
		Item Search		To Items page in the web application.
			Item Add	To add an inventory item to the PROMPTT® system.
			Item Change	To change an inventory item in the web application.
			Item Delete	Reserved for future use.

		Item Template Detail Search		To the Item Template Details page in the web application.
			Item Template Detail Add	To add a detail to an item template in the web application.
			Item Template Detail Change	To change a detail of an item template in the web application.
			Item Template Detail Delete	To delete a detail from an item template in the web application.
		Item Template Search		To the Item Templates page in the web application.
			Item Template Search Add	To add an item template to the PROMPTT® system.
			Item Template Search Change	To change an item template in the web application.
			Item Template Search Copy	To copy an item template in the PROMPTT® system.
			Item Template Search Delete	To delete an item template from the PROMPTT® system.
RIGIQ Data Visualization				To the RIGIQ data visualization menu options in the web application.
	Dashboard Content			
		Location Performance		To add the Location Performance content brick to the Home page.
		Monthly Compliance		To add the Monthly Compliance content brick to the Home page.
		Overall Performance		To add the Overall Performance content brick to the Home page.
		Rig Compliance		To add the Rig Compliance content brick to the Home page.

		Safety Monthly Performance		To add the Safety Monthly Performance content brick to the Home page.
		Total Safety Activities		To add the Total Safety Activities content brick to the Home page.
		Total Safety Activities by Rig		To add the Total Safety Activities by Rig content brick to the Home page.
		Total Safety Activities Summary		To add the Total Safety Activities Summary content brick to the Home page.
		Work Order Monthly Trend		To add the Work Order Monthly Trend content brick to the Home page.
		Work Order Rig Performance		To add the Work Order Rig Performance content brick to the Home page.
		Work Top 10 Most Expensive Component Types		To add the Work Top 10 Most Expensive Component Types content brick to the Home page.
	Data Visualization			To the Data Visualization menu options in the web application.
		Asset Management		To the Asset Management data visualization.
		Compliance		To the Compliance data visualization.
		Safety		To the Safety data visualization.
		Work Orders		To the Work Orders data visualization.
RIGIQ Data Analysis				To the RIGIQ data analysis menu options in the web application.
	Dashboard Content			
		Complete Percentage		To add the Complete Percentage content brick to the Home page.

		Component Map		To add the Component Map content brick to the Home page.
		Maintenance Score		To add the Maintenance Score content brick to the Home page.
		Maintenance Score Expired Percent		To add the Maintenance Score Expired Percent content brick to the Home page.
		Maintenance Score Rig Level		To add the Maintenance Score Rig Level content brick to the Home page.
		Maintenance Score Rig Level Open Tasks and Work Orders		To add the Maintenance Score Rig Level Open Tasks and Work Orders content brick to the home page.
		Maintenance Score Rig Level Weekly Performance		To add the Maintenance Score Rig Level Weekly Performance content brick to the home page.
		Maintenance Score Work Order Cost		To add the Maintenance Score Work Order Cost content brick to the home page.
		Monthly Compliance		To add the Monthly Compliance content brick to the home page.
		Rig Compliance		To add the Rig Compliance content brick to the home page.
		Rig Summary		To add the Rig Summary content brick to the home page.
		Safety Activity Types		To add the Safety Activity Types content brick to the home page.
		Safety Monthly Performance		To add the Safety Monthly Performance content brick to the home page.
		Safety Rig Performance		To add the Safety Rig Performance content brick to the home page.
		Work Order Monthly Performance		To add the Work Order Monthly Performance content brick to the home page.

		Work Order Rig Performance		To add the Work Order Rig Performance content brick to the home page.
		Work Order Rig Summary		To add the Work Order Rig Summary content brick to the home page.
	Data Analysis			To the Data Analysis menu options.
		Compliance		To the Compliance data analysis.
		Component Map		To the Component Map data analysis.
		Inspections		To the Inspections data analysis.
		Maintenance Score		To the Maintenance Score data analysis.
		Maintenance Score Rig Level		To the Maintenance Score Rig Level data analysis.
		Rental Utilization		To the Rental Utilization data analysis.
		Safety		To the Safety data analysis.
		Work Orders		To the Work Orders data analysis.
	RIGIQ Predictive Analytics			To the RIGIQ Predictive Analytics

Appendix B - Keywords

Keywords are used in instruction filters, subscription filters, work order detail update rules, and checklist detail update rules. They greatly enhance the ability to filter when an instruction will be used, a subscription will be created, or a detail will be updated by allowing mathematical operations to be performed. Keywords are denoted by an asterisk (*) at the beginning of the word.

Keyword	Action	Example	Result
*Today	Compares to the current date	Date last inspected=*Today	When the date last expected on the component is equal to the current date then the object will be eligible.
*Detail.<DetailName>	Compares to the value of a detail	WellName<>*Detail.Previous Well Name	When the well name does not equal the previous well name then the object will be eligible.
*Location.<DetailName>	Compares to a location detail	100>*Location.ActualHoursDown	When the actual hours down for the component location are less than 100 then the object will be eligible.
*NoValue	Compare to a blank value	Serial Number=*NOVALUE	When the serial number has no value then the object will be eligible.
*Mult(n,<DetailName>)	Compares to a multiple of the detail	500<*Mult(3,HoursatLastOilChange)	When the hours at last oil change multiplied by 3 is greater than 500 then the object will be eligible.

Keyword	Action	Example	Result
*Div(n, <DetailName>)	Compares to the quotient; where *n* is the divisor and the detail is the dividend	50>*Div(5,HoursTotal)	When the total hours divided by 5 is less than 50 then the object will be eligible.
*Add(n. <DetailName>)	Compares to the sum of detail and n.	100=*Add(50,EndPressure)	When end pressure plus 50 equals 100, then the object will be eligible.
*Sub(n,<DetailName>)	Compares to the difference of *n* minus the detail.	250=*Sub(400,GearBoxTemp)	When 400 minus gear box temperature equals 250, then the object will be eligible.
*MultD(<DetailName>,<DetailName>)	Compares to the product of the two details multiplied.	SafetyValue<*MultD(OilTemperature,OilPressure)	When the Oil Temperature times the Oil pressure is greater than the safety value, then the object will be eligible.
*DivD(<DetailName>,<DetailName>)	Compares to the quotient; where the first detail is the divisor and the second detail is the dividend	Ton Mile<(TotalHours,Odometer)	When the total hours divided by the odometer are greater than the ton-mile, then the object will be eligible.
*AddD(<DetailName>,<DetailName>)	Compares to the sum of the two details.	135=*AddD(HoursToday,HrsLastCoolantChange)	When the sum of the hours today and last coolant change are equal to 135, then the object will be eligible.
*SubD(<DetailName>,<DetailName>)	Compares to the difference of first detail minus the second detail.	25 >*SubD(Last 250 Hour Service,HoursToday)	When the Last 250 hour service minus the hours today is less 25, then the object is eligible.

Keyword	Action	Example	Result
*In(<DetailName>:'value1','valuen')	Compare to the values in a list	Family=*In(Family:'12V2000','14L','16V2000')	When the components family is '12V2000', or '14L', or'16V2000', then the object is eligible
*Blank	Compares to a blank value	Spud Date<>*Blank	When the spud date of the component has no value, then the object will be eligible. If used in a detail update, will insert blanks into the detail.

Table 4 – Keywords

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