

ZEDI ROUGHNECK RELEASE

ZEDI ROUGHNECK ENHANCEMENTS

Gain more insight to our new enhancement to Zedi Roughneck. Zedi continues to improve the platform based on the feedback that you have provided. We are always looking for ways to make your user experience and work processes better.

What's new in Zedi Roughneck?

- 1) Improvements to the Equipment Module – Improved search capabilities and more in depth specification recording for asset management.
- 2) Updates to Material Transfers functions – Updated location information for NTS, recognition of nonstandard pricing for Tubular equipment and flexibility around workflow role areas.
- 3) New functions in Analytics – New data export and sorting options.
- 4) Corrections to text entry in HS&E

When is this happening?

July 23, 2018

Where can you see these updates?

1) Equipment module improvements

Improved alphanumeric search capabilities

- For Keyword Searches in the Equipment module, you are now able to search for records using a partial alphanumeric search entry. Users may also enter certain special characters (Dashes (-), underscores (_), and dollar signs (\$)) into the search field.
- Instructions and a tooltip have been added to provide clarification on text entry and keyword search.

Keyword Search

Perform a search by typing in a **keyword or part of a keyword with at least 3 characters** for the item you are looking for. (This will not return recycle bin nor draft items).

Keyword Search
Close

The Equipment Keyword Search searches in the following fields: Account Code, Additional Information, AFE Number, Cost Center, CRN Number, Description, Field Tag Number, Manufacturer, Model Number, Owner, Property Number, Provincial Registration Number, Serial Number, and Tax Roll Number.

Dashes (-), underscores (_), and dollar signs (\$) are the only special characters that will be searched for. Periods (.), commas (,), asterisks (*), quotation marks ("), question marks (?), and slashes (/) will not be searched for.

Please note

The search function does not recognize the following special characters: periods (.), commas (,), asterisks (*), apostrophes ('), quotation marks ("), question marks (?), and slashes (/ \).

New fields in Tank options

- Several new fields are available (upon request) for data entry and drop down selections.

Add Equipment

Equipment Details

Date Installed: (YYYY-MM-DD)

Date Removed: (YYYY-MM-DD)

Service Type: Sweet Service

Service Type Fluid:

S/D Requirement:

Operating Temperature: C

Operating Pressure: kPa

Heated:

Internal Coating:

Internal Coating Type:

Man Way:

Man Way Size: MM

Tank Construction:

Secondary Containment:

Containment Type:

Tank Lined:

Lining Type:

Portable/Skidded:

Elevated:

Anodes:

Gas Blanket:

Interstitial Space Monitoring Type:

Tank Integrity is verified by Operations Monthly:

Integrity Test: Pass Fail

Integrity Test Fail Comment:

D&A Form Requested from Operations:

D&A Form on file:

Class / Grade:

- The information in these fields can also be applied to filter searches through the Advanced Search option

Company Details

Prov. Reg. Number:

Alberta British Columbia Manitoba
 Saskatchewan Unknown Ontario

Prov. Reg. Province: Quebec New Brunswick Nova Scotia
 Newfoundland PEI NWT
 Yukon Nunavut

Has Prov. Reg. Number:

CRN Number:

Last Served: to (YYYY-MM-DD)

Next Service: to (YYYY-MM-DD)

Date Installed: to (YYYY-MM-DD)

Date Removed: to (YYYY-MM-DD)

Gas Blanket:

Dipstick Pressure Gauge
 Vacuum Gauge Other
 Site Glass

Interstitial Space Monitoring Type:

Tank Integrity is verified by Operations Monthly:

Tank Integrity Test:

D&A Form requested from Operations:

D&A Form on file:

- Users may add this field to the search results and reports.

Report Fields

Available Fields

- Shut Down Requirement
- Stressed Relieved
- Suitable For Sour Service
- Support
- Tank Lined
- Tank Type
- Tax Roll Number
- Test Company
- Theoretical Fuel Consumption (m:

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Selected Fields

- Status
- Price Per Unit
- D&A Form On File
- D&A Form Requested
- Date Removed
- Tank Integrity Test
- Tank Integrity Test Fail Comment
- Tank Integrity Verified
- Description

Save Search As:

If you want to save this report, type in the name you want this saved as

Please note

To add the new Tank fields to your Roughneck instance contact roughnecksupport@zedisolutions.com

2) Updates to Material Transfer module

LE and ES fields for NTS locations (British Columbia)

- If available in an NTS location, both LE and ES fields will be displayed in the Search results and View page of the record.

In the example below, the ES field is displayed in the Material Transfer search result.

Material Transfers Search Results

Criteria for Displayed Results: [\[Refine Search\]](#)
 Attachments: Both Location: B/b-016-L/094-A-07

◀◀ Page 1 ▶▶ [\[Printer Friendly Version\]](#) [\[Export to Excel\]](#) [\[New Search\]](#)

Displaying Items: 1-2 of 2

[Print](#)
[Delete](#)

	Action	Approved By	Date Transferred	From Primary Location	From Secondary Location	MT ID	Prepared By	To Primary Location	To Secondary Location
				v	v	v		v	v
<input type="checkbox"/>	- Action -	Doug Watt	2014-06-04	Ⓟ b-016-L/094-A-07	Ⓟ b-016-L/094-A-07	150	Doug Watt	00 /06-27-032-06W5/02	00 /06-27-032-06W5/ 02
Equipment ID	Equipment Type	Current Condition	Current Status	Current Price Per Unit					
807034	Pressure Vessels - Separators	A (Brand New)	Active	\$68,000.00					

The ES field will also be displayed in the View Material Transfer page, as shown below.

Display Material Transfer

[\[Printer Friendly Version\]](#) [\[Back\]](#)

Material Transfer #150	
From Location	
District:	DISTRICT 3
Area:	DEEP BASIN
Field:	FIELD 5
Primary Location:	B/b-016-L/094-A-07
Secondary Location:	B/b-016-L/094-A-07

Unique equipment IDs for tubular or rod equipment with nonstandard pricing

- If performing a Material Transfer of a tubular or rod equipment type and the new location has a tubular/rod that is the same type, condition but a different price, then the transferred quantity will **not** merge with the tubular/rod's equipment ID of the new location but will become its own unique equipment ID due to its different price.

Adjustments to workflow role areas when an event is active (MT & MOC)

- If a user has a workflow role in a currently active Material Transfer (MT) or Management of Change (MOC), you are now able to update the user's role by adding net new areas and by removing any areas that do not have active workflow events.

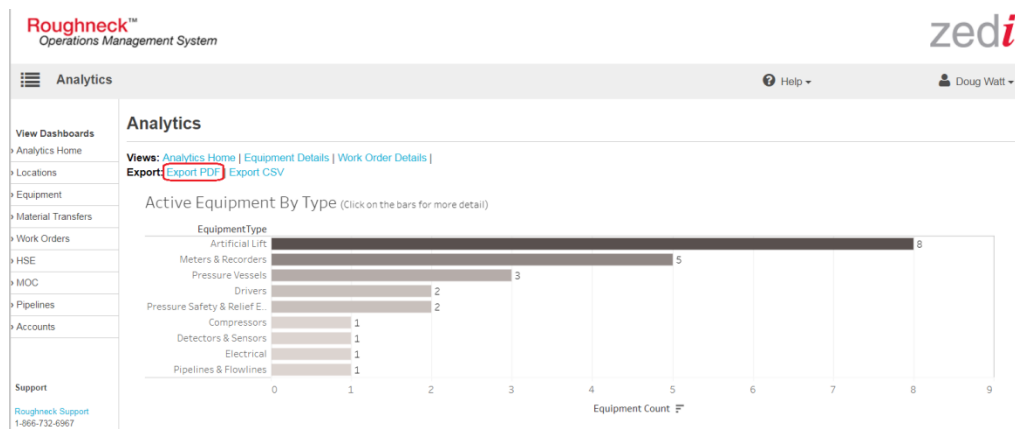
3) New functions available on the Analytics module

Exporting landing pages as a PDF or CSV files

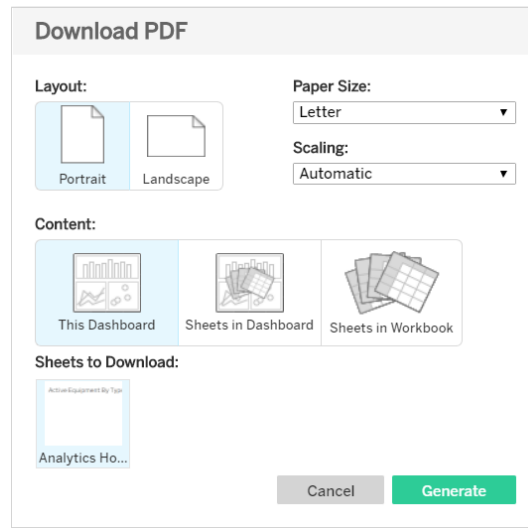
- Users may now export the Analytics landing page dashboards to PDF and CSV.

PDF Instructions:

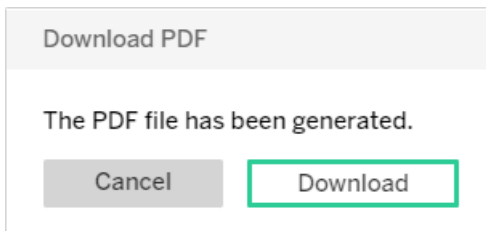
1. Go to the dashboard that you would like to export to a PDF.
2. Click **Export PDF**.



3. Select the Layout, Paper Size, Scaling, Content and Sheets to Download.



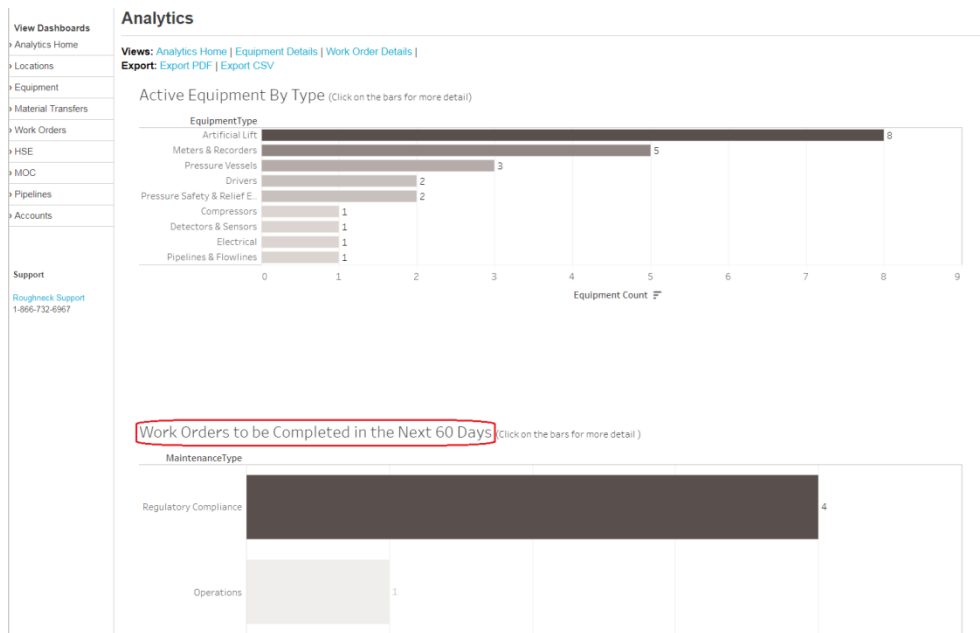
4. Click **Generate**.
5. Click **Download**.



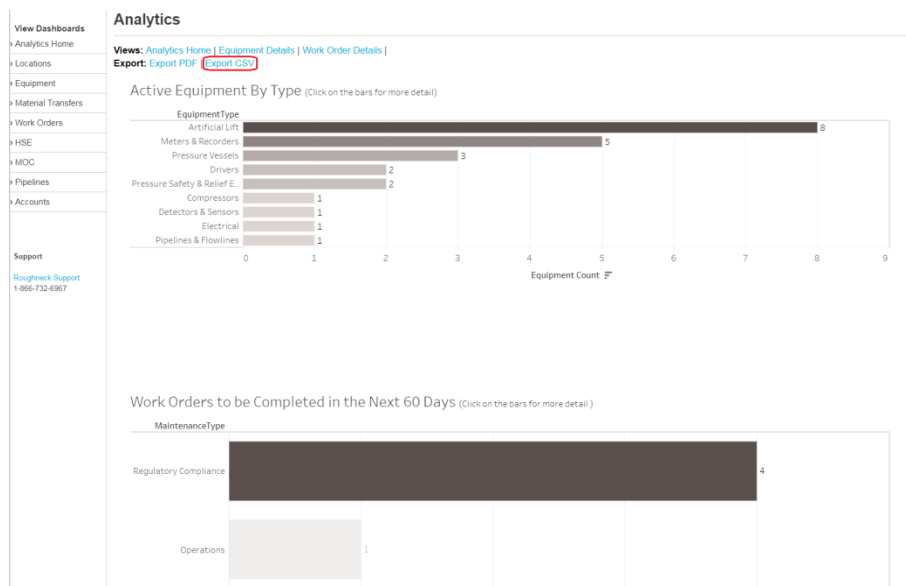
6. The PDF will be downloaded to your computer.

CSV Instructions:

1. Go to the dashboard that you would like to export to a CSV.
2. Click on the title of the table or graph that you would like to export to CSV. This is required especially if there are multiple tables or graphs in one dashboard view.



3. Click **Export CSV**



4. Click **Download**

Download Crosstab

The crosstab has been generated.

5. Your CSV will then be downloaded to your computer.

Analytics Sorting Tables

- Users will now have the ability to organize analytics data via sorting tables. Sorting tables are available for the following dashboards in Analytics
 - Analytics Home
 - Equipment Details*
 - WO Details
 - Locations
 - Top Locations for Work Orders
 - Location Details
 - Equipment
 - Top 10 Equipment for Work Orders
 - Equipment List
 - Material Transfer
 - MT Details
 - Work Orders
 - Delinquent Work Orders*
 - Completed Work Order Listing*
 - MOC
 - MOC Details

Please note

*In order to view the Roughneck record from these tables, you must click on the far right column. Tableau is aware of this bug and will fix it on their next release.

4) Quick fixes to HS&E module

Chrome Users: Text box contents now carry forward to subsequent tabs.

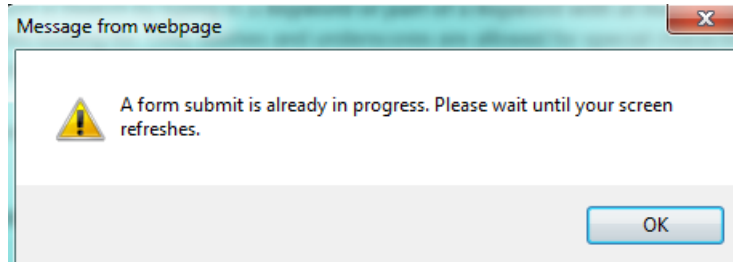
- In the HSE Module using Chrome, when entering text in the “Explain the Incident”, “Immediate Actions” and “Suggestions” sections in the General tab, the same text is now shown in the subsequent tabs under the same sections.

“Report by” field displays

- When viewing an incident, the “Reported by RN User” and “Reported by Other” entries are now displayed consistently under the correct fields/columns throughout the Search Results, View page and Export to Excel.

Misc.: Search progress update

- If you are executing a search and you attempt to click the Submit/Search button more than once, the following pop up message will appear:



If you have any questions about this update please contact [Roughneck Support](#) at 1-866-732-6967 or roughnecksupport@zedisolutions.com