Zedi Composition Management Enhancements

Gain more insight with Zedi Composition Management (ZCM) and our new enhancements. Zedi continues to improve the ZCM platform based on your feedback. We're always looking for ways to make your user experience better. We are excited to inform you of the new improvements we've made based on your requests.

What's New in ZCM?

Sampling Schedule

The Sampling Schedule is a new work flow management tool which is a key piece to your Sampling Program. The Sampling Schedule is beneficial for improving control regarding EPAP compliance, and will automatically reoccur to make it easy and efficient to stay within those regulations. In addition, the schedule allows you to do the following:

- Create a schedule (recurring task) that tracks what samples have been taken and the ones yet to be taken
- Assign the recurring task to a user or group to action on
- Receive email notifications on upcoming, completed and or overdue tasks
- Mark when samples have been sampled or simply defer or skip them for future sampling
  - Easily track when samples were taken, deferred or skipped

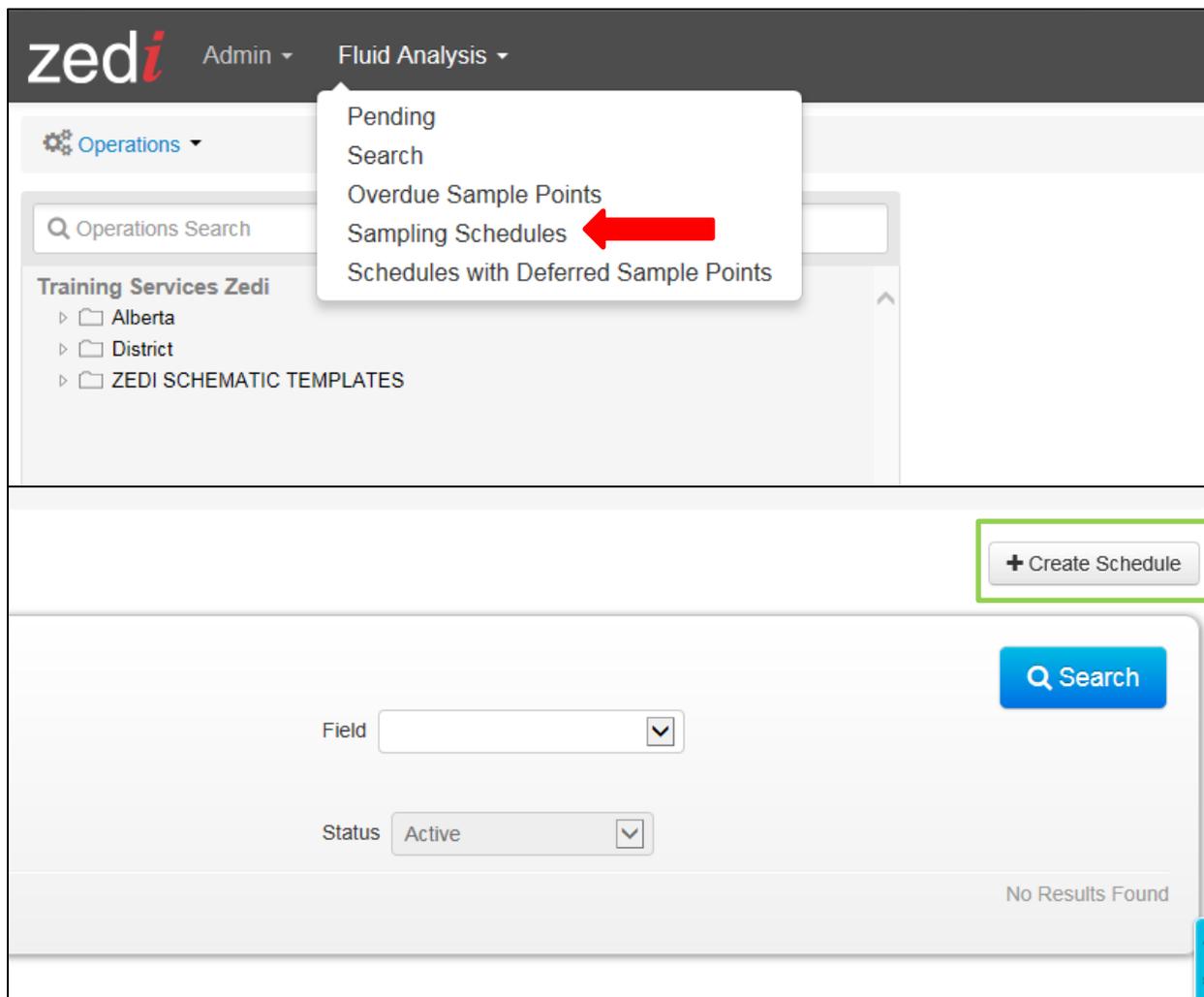## When is this happening?

June 22, 2017

Where can I find this change?

Zedi Access, Operations

(see below for detailed documentation on process)

A. CREATE YOUR SCHEDULE

To create a Sample Schedule, select the Fluid Analysis drop down menu and then select create schedule

In creating your sample schedule complete the following steps:

1. Name your schedule
2. Select your repeat frequency in which you would like your sample schedule to continuously reoccur (monthly, quarterly, yearly etc.)
3. Select your start date of your sample schedule and your end date of your sample schedule
    Note: The start/end date range is the window during which you aim to complete your sampling in the field.
4. Select your district, area, field and site and click add sample points
5. Assign your sample schedule to at least one user or group
6. Select reminder for your assigned user/group
    *   Before start date, on completion or when schedule is overdue
7. Select Save

Note: Once a schedule is created it does not need to be created again, it will automatically reoccur. All fields marked with red asterisks are mandatory fields.

E.g. of a completed sampling schedule

B. MARK YOUR SAMPLES

After creating your sample schedule and saving, it will display in the Sampling Schedules page for editing (if necessary) and sample marking.

1. Mark samples as sampled (best practice is to not mark unless sample is actually sampled)

OR

2. Skip the sample completely (e.g. if sample is not sufficient and needs to be re-sampled) or defer the sample for a later time (e.g. well gets shut in or hibernated)

Note: Deferred samples will be moved into the Schedules with Deferred Sample Points under Fluid Analysis. Future sample marking can be completed here when applicable.
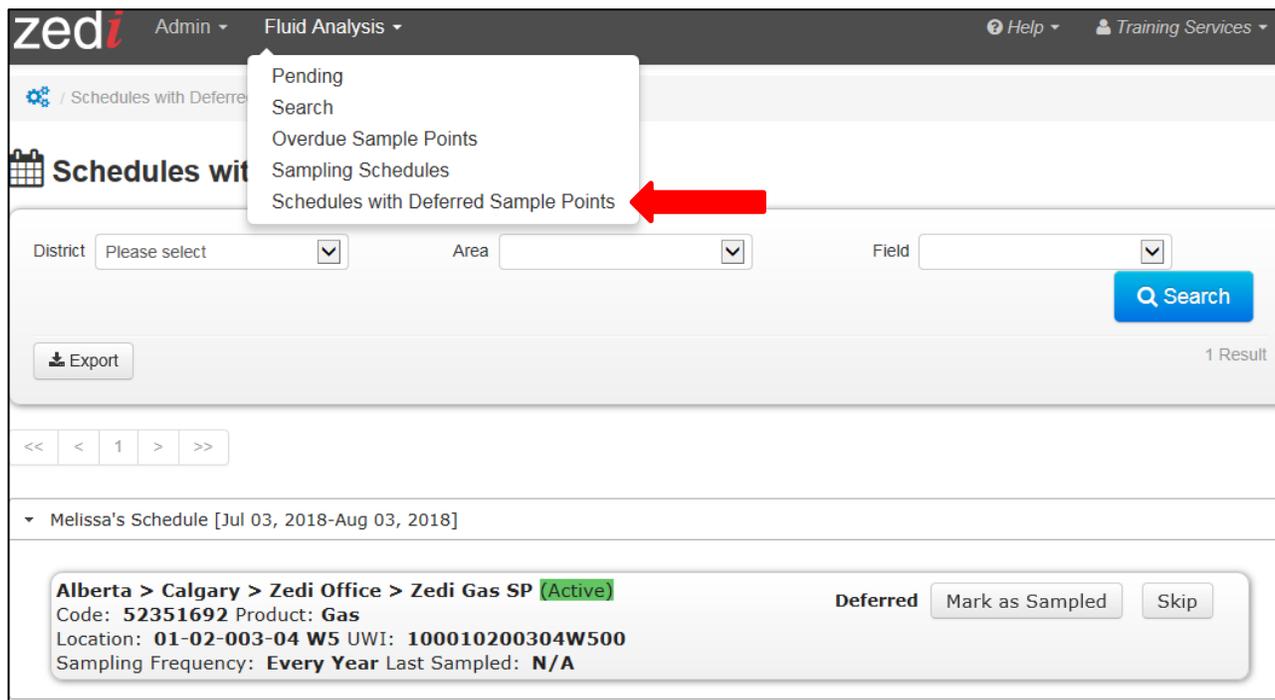
Suggested Short Cut (Administrator Function Only)

If there are hundreds of samples that need to mark **sampled**, simply select the drop down arrow by edit and select complete. By selecting this feature it will automatically mark all samples as sampled and complete the schedule.
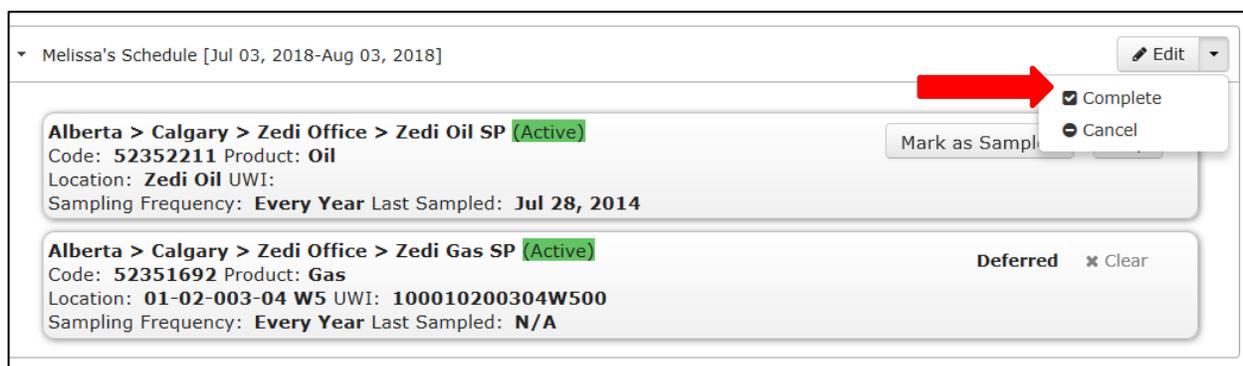
C. PERMISSIONS (ADMINISTRATOR ACCESS ONLY)

Manage Sampling Schedules permission will need to be assigned for the Sampling Schedule under web permissions.

*Manage Sample Points = Ability to create, edit, delete sample points
*Mange Sampling Schedules = Ability to create, edit, delete a schedule