

Project Team Proposal Specification Support

Enhancing PIDX Field Ticket Response Schema

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1. **Proposed Project Team/Study Name**

Enhancing PIDX Field Ticket Response Schema (v1.61)

- **Executive Summary**

PIDX Business Processes and Messages Work Group would like to update the field ticket response schema with workflow message descriptions and status codes.

- **Description**

3.1 Purpose

The purpose of this project is to update the PIDX field ticket response schema to accommodate current technology enhancements in workflow messages.

3.2 Scope

- *The scope is limited to field ticket workflow submission messages so that we can understand the technical challenges, risks, and potential solutions to the wider PIDX standards.*
- *Identify technical and business gaps that exist in the current PIDX field ticket messaging schema.*
- *The scope will also include reviewing existing PIDX users who have implemented similar workflow field ticket message solutions.*
- *Map process for routing evaluation (what level of approvals, approvers, checks needed)*
- *Map process for routing evaluation (what level of approvals, approvers, checks needed)*
- *Identify process/flows for costing information entry, price/rate validations, service*

entry sheet creation

- Identify process/flows for sending back messages to submitter

3.3 Goal

- Identify criteria for success of the deliverables / specification as deployed in

industry.

Update field ticket submission workflow messages for these categories:

- Field Ticket Service Requests-add status codes, i.e. receive, supplier acceptance, confirmation of services, etc.
- Field Ticket Rejection- add status codes, i.e. operator coding error, unit of measurement, invalid field personnel id, incorrect pricing, etc.
- Field Ticket Acceptance or Acknowledgment, i.e. Status code - Accepted
- Field Ticket Approval, i.e. Status Code – Approved

Note: The field ticket workflow status codes are group into three groups (service request, performance, and invoice statuses)

Field Ticket Workflow Enhancement Status Codes		
Status Code	Description	Comments
1XX Series - Field Ticket Service Request		
101	Operator Request Manual	Operator request for services submitted manually, i.e. phone call.
102	Operator Request Electronic	Operator request for services submitted electronic, IoT, electronic communications, etc.
103	Acknowledgement	Acknowledgement by supplier that services can be performed.
104	Plan	Supplier plan for services to be perform.
2XX Series - Field Ticket Service Performance		
200	Started	Service Work has started
201	Complete	Supplier notification of services complete
202	Confirmation of Services By Operator	Signed ticket or electronic confirmation. Of services Does not indicate that the field ticket or lines, i.e. service price, quantities, performance, etc. was approve by operator
250	Rejected Service Request	Rejection of a request for services by a supplier
251	Rejected Performance	Rejection of services performed by supplier by operator
252	Rejected No Signature	Rejection of field ticket as result of no confirmation, i.e., electronic confirmation or manual signature
253	Rejected Charge Coding Error	Rejection of field ticket as a result of incorrect charge code, i.e. WBS, Cost Center, Network, Project, or other cost object, etc.
254	Rejected United Of Measurement	Rejection of field ticket as a result of incorrect line item unit of measurement
255	Rejected User ID	Rejection of field ticket as a result of incorrect user id

256	Rejected Price	Rejection of field ticket as a result of incorrect line price issue.
<i>3XX Series - Field Ticket Invoice Status</i>		
300	Approval	Invoice approval status as it related to a field ticket
301	Payment	Invoice payment status as it relates to a field ticket.

- Identify how the proposed deliverables / specification relates to existing or under development deliverables / specifications. Identify how these will relate to each other.

Existing Standards	New Standards/Deliverables
FieldTicketResponse.xsd	Existing standard (FieldTicketResponse.xsd) will be updated with additional response messages.

- Identify the integral sets of specifications that will be created or modified by the proposed work effort. (See 8.0 Initial Contributions)

Deliverables:

- Additional Workflow messages to field ticket response schema
- Lessons learned from enhancing message responses architecture
- Findings from other members or partners that have executed similar workflow messages, successfully or unsuccessfully.
- Identify the expected useful life of the proposed deliverables / specification, e.g. estimated retirement dates or circumstances.

The useful life of field ticket messages will be determine based on risks and gaps identified in this project.

- Background
 - Identify how this work is specific to the energy industry and to the primary area of focus for PIDX. Identify other sources for aspects of the required solution that are not industry specific. *The enhancements to the workflow message field ticket schema pairs well with the movement towards more mobile friendly technology devices, i.e. tablets, smart phones, and integrating with Blockchain technology.*
 - Identify the solutions that currently exist in the proposal. Identify competing technologies/solutions.

Current solutions in this area include legacy solutions, and marketplace cloud proprietary platforms. The goal of PIDX is to drive field ticket message workflow approval standards for the industry. We don't believe the proprietary platforms are long-term viable solutions.

- Identify other organizations that are doing similar work. Identify what they are doing and why additional work is needed. Identify how the proposed work effort will coordinate with related work efforts.

We believe that there are PIDX members that have incorporated similar workflow messages. One of the goals of this project is to investigate them further, capture lessons learned, and any best practices that have been developed.

- Identify the industry organizations / groups who want this deliverable / specification.

We are currently working with Baker Hughes, a GE Company (BHGE), Cortex, Oildex, SAP, Spira, ConocoPhillips, Ondiflo, Amalto, Microsoft, LiquidFrameworks, Frontline Group and ConsenSys on this specification.

- Identify all the stakeholders of which you are aware.

Baker Hughes, a GE Company (BHGE), Cortex, Oildex, SAP, Spira,

ConocoPhillips, Ondiflo, Amalto, MicroSoft, LiquidFrameworks, and ConsenSys on this specification.

- Identify the stakeholders who are willing to join the work effort. (See Sponsor & Participants)

BHGE, Cortex, SAP, Spira, ConocoPhillips, Ondiflo, Amalto, LiquidFrameworks, and Consensys have confirmed that they are willing to join the work effort within PIDX.

- Proposal

The proposal includes mapping enhancements to the PIDX Field Ticket Response schema.

The goal of the project is to understand how current PIDX architecture would map, both technical and business process, and identify gaps or challenges that are encountered.

The project team is also expected to canvas the PIDX community for similar workflow messages and capture lessons learned and best practices.

- Benefits

Key Benefits include:

Updates to field ticket message schema will accommodate technology messages trends standards and applications, i.e. mobile devices, supplier marketplace portals, IoT sensors, etc.

- Sponsor and Participants

PIDX member/company sponsoring development of these specifications/this project:

Member	Company	E-Mail Address
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James Thompson	ConocoPhillips	James.Thompson@cop.com
Marc Battistello	BHGE	Marc.battistello@bhge.com
Chris Lambert	Cortex	clambert@cortex.net

The following PIDX members/companies are participants in the development of these specifications:

Member	Company	E-Mail Address
James Thompson	ConocoPhillips	James.Thompson@cop.com
Chris Lambert	Cortex	clambert@cortex.net

Mail distribution list required?	<i>No</i>
Please provide the name of the mail distribution list:	NA

- Deliverable Schedule

To be determine base on resources.

- Anticipated Completion Date

Project Completion date	February 28, 2019
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- Initial Contributions

Document Name	Type of Document	Document Source
<i>FieldTicketResponse.xsd</i>	<i>Field Ticket Schema v1.61</i>	<i>PIDX</i>

- PIDX Resource Requirements

Minute taking	0
Facilitation	0
<i>List other activities</i>	0

TBD – Who would be the technical contact to lead this effort.

Assume the ‘typical’ amount of time commitment for a 3 month-long effort with weekly meetings.

Planned activity	Number per month	Number of months	Duration (hrs)	PIDX Time (hrs)
Conference calls	4	3	1	1
Face to face meetings	0	0	0	0

Total PIDX staff time required for this project.	
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- Sponsoring Member /Work Group/ Sub-Committee

This specification has been submitted by *[insert name]* on behalf of the *[insert name]* Work Group/Sub-Committee.

Contact Information:

Name: *[insert name]*

Company: *[insert company]*

Mailing Address: *[insert mailing address]*

Telephone: *[insert telephone]*

Fax #: *[insert fax#]*

E-Mail Address: *[insert e-mail address]*

The chair of this Work Group/ Sub-Committee has reviewed this submission for completeness and understands this particular Work Group/ Sub-Committee is the Sponsoring Work Group/ SIG, responsible for the communication process. This does not mean the Chair or Work Group/ SIG is approving the actual work or its inclusion in any specification.

Chair's Signature or Initials (*electronic is acceptable*)

Date

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PIDX Executive Committee

[To be completed by PIDX Staff]

Upon review by the PIDX Executive Committee, this Project Team Proposal (PTP) is:

____ Approved

____ Denied

____ Requires additional information

If "Denied" or "Requires additional information, please provide details:

Date