



Exploration Archives 4.5

Workflows

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1.0 Workflows

The general workflows for organizing and maintaining seismic data in Exploration Archives varies across users. The order of the general workflows, and the steps in each workflow do not have to be completed exactly as presented. However, the activities are listed in a logical sequence.

As you work through the steps, you will discover that you have to complete some of the tasks before beginning others. For example, you must first add a seismic survey before you can link any navigation to it, and you must add the products before making them available for ordering.

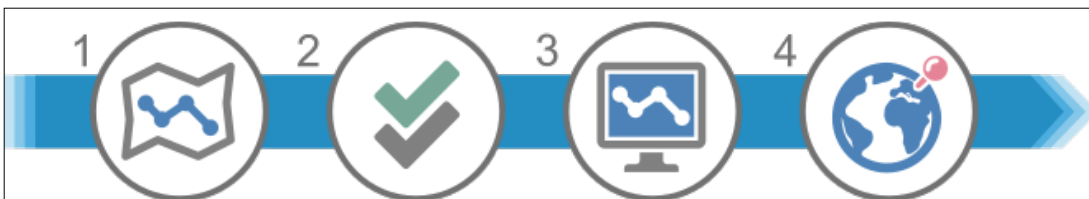
General workflows include :

1. Adding new seismic survey data



1. Acquire new data.
2. In the **Seismic** module of Exploration Archives Desktop, [add a new seismic record](#) and enter the associated details.
3. [Add and link the contract](#) to the seismic record, if applicable.

2. Adding seismic survey navigation



1. Receive seismic survey navigation.
2. Perform quality control on the navigation according to your company procedures.
3. [Add the seismic navigation](#) to the seismic record in Exploration Archives.
4. Verify that the location is mapped correctly.

3. Adding seismic survey products



1. [Create a catalog session](#) in the **New Item Catalog** module.
2. [Add files](#) and [media](#) to the catalog session.
3. [Link the files to the media](#) and [link the files to the seismic](#).
4. Perform quality control activities according to your company procedures.
5. [Move the files to production](#).

4. Ordering products



1. Depending on your role and access to Exploration Archives:
 - » Use Exploration Archives [Desktop to create a data request](#)
 - » Use Exploration Archives [Browser to create a data request](#)
2. Continue creating the request:
 - » Use Exploration Archives [Desktop to add products](#)
 - » Use Exploration Archives [Browser to add products](#)
3. Using Exploration Archives Desktop, review the data request and [execute the order](#). Package the products and send for delivery.
4. [Monitor the delivery](#) of the products.

The general workflows for organizing and maintaining seismic data in Exploration Archives varies across users. The order of the general workflows, and the steps in each workflow do not have to be completed exactly as presented. However, the activities are listed in a logical sequence.

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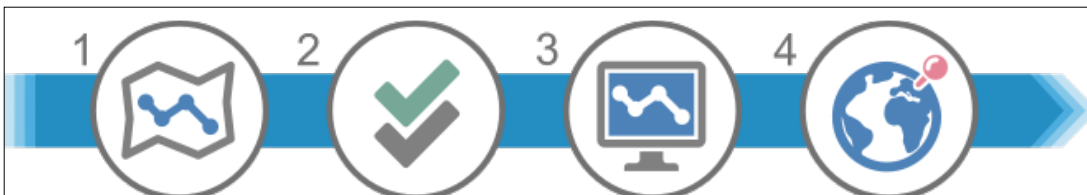
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Exploration Archives 4.5 - Workflows

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3. Using Exploration Archives Desktop, review the data request and [execute the order](#). Package the products and send for delivery.
4. [Monitor the delivery](#) of the products.

2.0 License

New in this version:

- » The License Editor has been modified to use the new ESRI Geometry Editor.
- » The Map Selection tools and Cutout Tools have been updated to reflect the new Geometry Editor

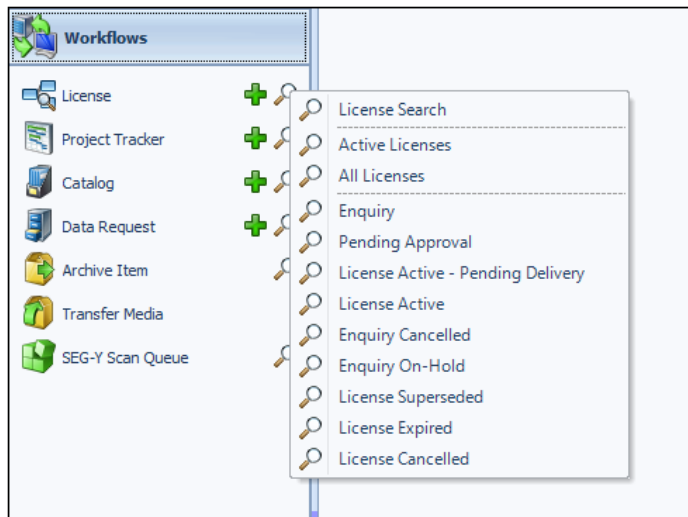
The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress.

A variety of features and tools are available to create, modify and query data licenses.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To generate a search and open items in the License module:

1. Click **search** next to **License** in the Navigation panel.



2. Select the appropriate search type and the search window will open
3. Enter your values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Grid** grid and the associated information for all selected items display in the **Related Records** tabs.

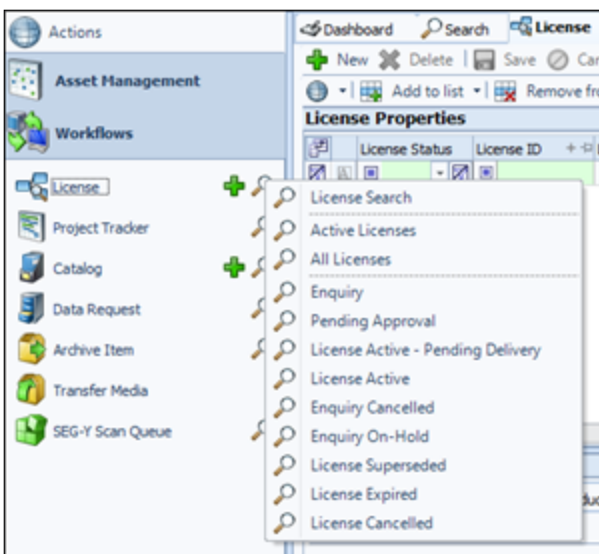
For information regarding status searches, refer to [Understanding license statuses](#).

The License module includes a full spectrum of options and resources to manage your data license workflow and monitor progress. A variety of features and tools are available to create, modify and query data licenses.

The License module is accessible in the navigation panel under **Workflows**.

The information you add to a license in Exploration Archives provides or initiates all the necessary deliverables for the transaction. The License module calculates fees according to the coverage area that you define using the cutout tool, while the document tool generates the contract and license documentation.

To open items in the **License** module:



1. Click **search** next to **License** in the Navigation panel.
2. Select the appropriate search type and the search window will open
3. Enter your filter values and click **Search**.

The results open in the **License** module. The grid displays the information for each item. To view the **Related Records** for an item, click on a row in the grid and the associated details display in the **Related Records** tabs.

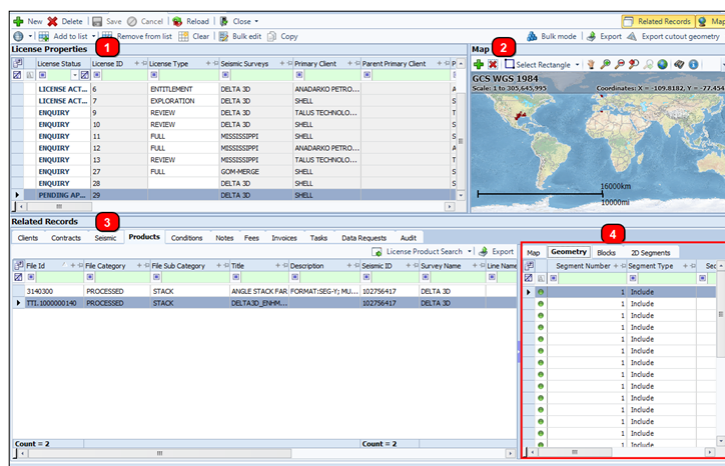
To view the **Related Records** for multiple items, turn on **Bulk Mode**, select multiple items in the **Grid** and the associated information for all selected items display in the **Related Records** tabs.

For information regarding status searches, refer to [Understanding license statuses](#).

2.1 Understand the screen layout

The **License** module is for viewing and managing licenses. The main screen of the License module provides a view of the information related to the licenses from your search criteria. In addition to the main view, the module has an **Editor View** and a full screen view. For information about the **Editor View**, refer to "Create a license" on page 11.

The main view is split into the following panes:

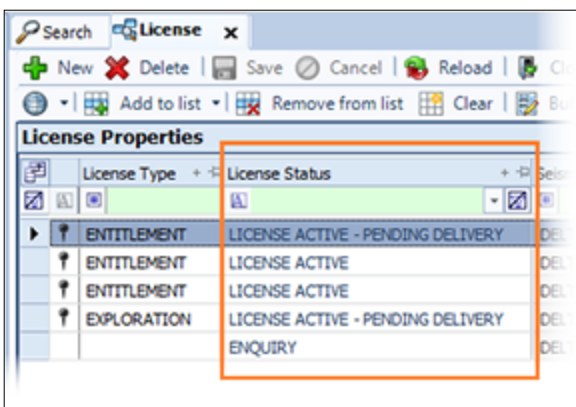


1. **License Properties grid:** Lists the licenses with the associated detail across various columns.
2. **Map:** Displays the location of licensed data.
3. **Related Records:** Displays information for the selected license in the License Properties grid. The Related Records panel includes several tabs with different categories of information.
4. The **Products** tab in the Related records panel includes a set of secondary tabs for viewing detail related to a selected product.

2.2 License statuses

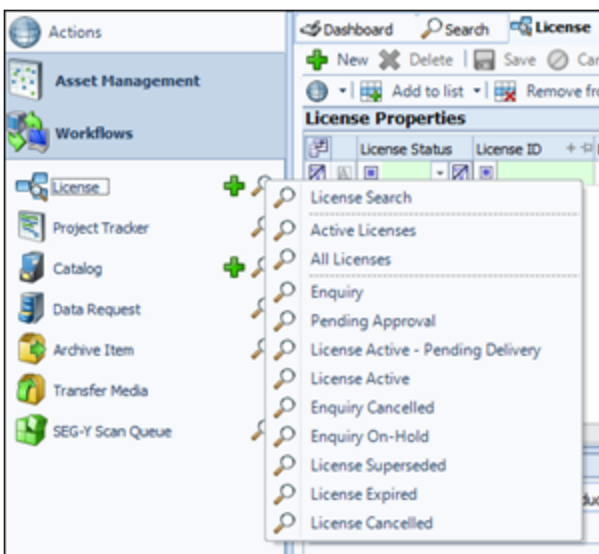
The **license status** indicates the progress of a license.

The status of a license displays in the License Status column of the License Properties grid.



You can use the search option to search all licenses, or according to status.

To use the status search, click search next to License and click a status category to open the search window.



The statuses available for the working phase of a license include:

- » **Enquiry:** This is the initial status for a newly created license. The sales associate is collecting information and specifying the license details, monitoring tasks and generating the required documentation. After entering all required information, the license is ready for the *Pending Approval* status.
- » **Pending Approval:** At this stage, the user generates and sends a proposal and license agreement to the client for approval. If the client does not approve the license agreement, you can recall the license back to the *Enquiry* status to modify the information. After the client approves the license agreement, change the license status to *License Active - Pending Delivery*
- » **License Active - Pending Delivery:** The client has reviewed and approved the license agreement. Details have transferred to a Data Request for preparation.
- » **License Active:** Client has received the data.

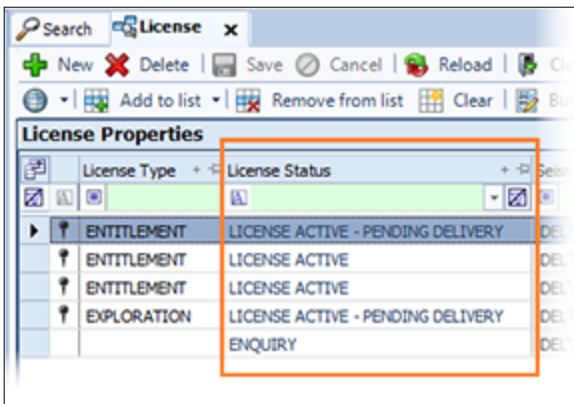
Aside from the typical working statuses, the License module includes several alternative end-case statuses:

- » **Enquiry Cancelled:** Cancelled, information saved.
- » **Enquiry On-Hold:** On hold with the option to progress in the future.
- » **License Superseded:** License has been replaced.
- » **License Expired:** Expiration date has passed, if expiry was set.
- » **License Cancelled:** License has been cancelled.

To change a license status, refer to "Updating a license status" on the next page.

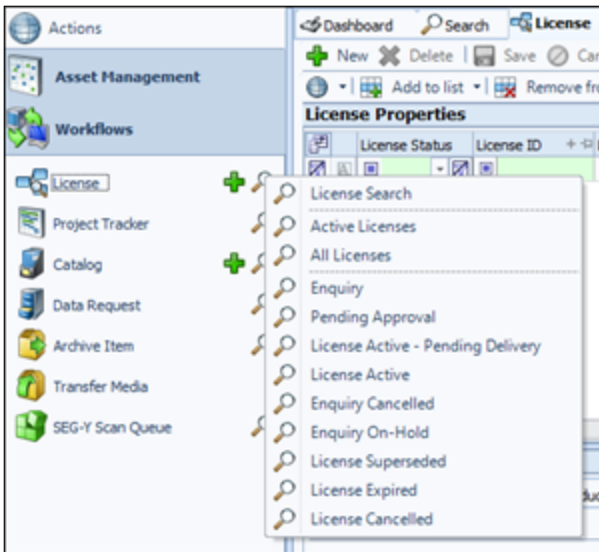
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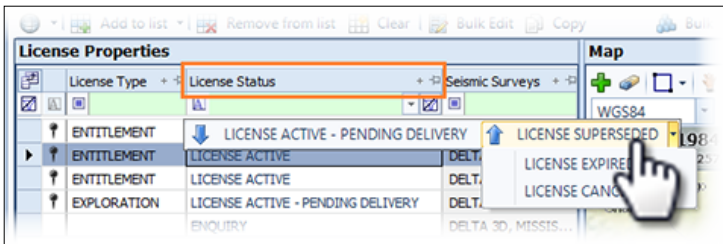
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- » **License Cancelled:** License has been cancelled.

To change a license status, refer to "Updating a license status" below.

Updating a license status

The license status indicates the progress of a license. To update the status of a license, locate the license in the **License Properties** grid of the License module. Click in the

cell of the **License Status** column to open the status options. Click the new status for the license and **Save**.



To access this functionality, you must have permission for changing a license status added to your profile. Your administrator sets the user securities for the license status functionality.



Note:

The status options available are restricted by your company's workflow. Not all statuses are available from the current status of a license.

2.3 Create a license

The **License** module maintains the current information for each license. Included with the **License** module is the **Editor View** for creating and editing licenses. You must open the **Editor View** to add or edit detail in the **License Properties** area, and the **Seismic** tab and **Products** tab of the **Related Records**.

To create a new license:

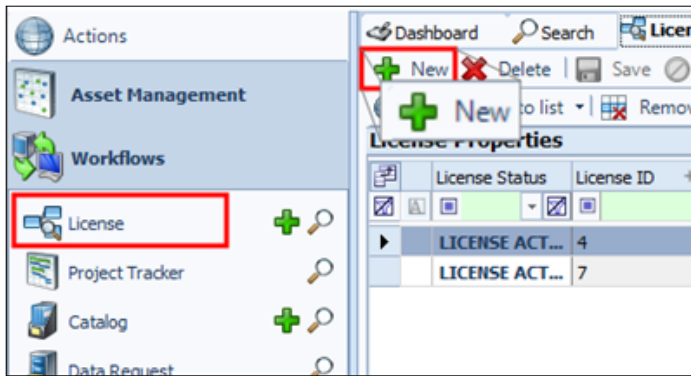
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- » Adding general information to the **License Properties** grid.
- » Adding seismic and associated products.
- » Creating the cutouts.

To begin a new license and add the general information:

1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.

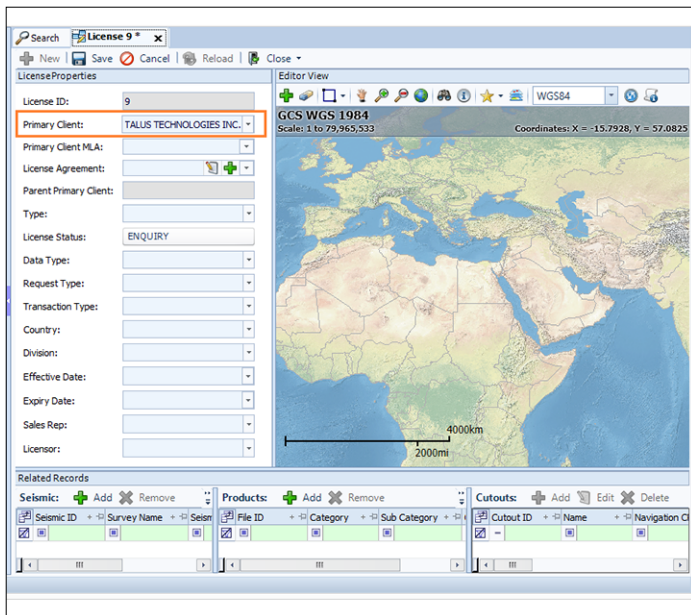


Note:

There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.



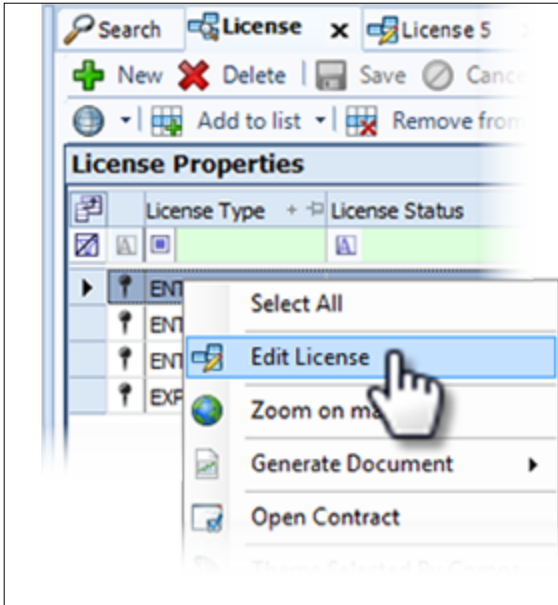
4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "Add a survey or product" on page 15.

To edit an existing license:

**Note:**

The information in the **License Properties** grid is read only. To edit the detail, you must open the **Editor View**.

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the details of the license available for editing.



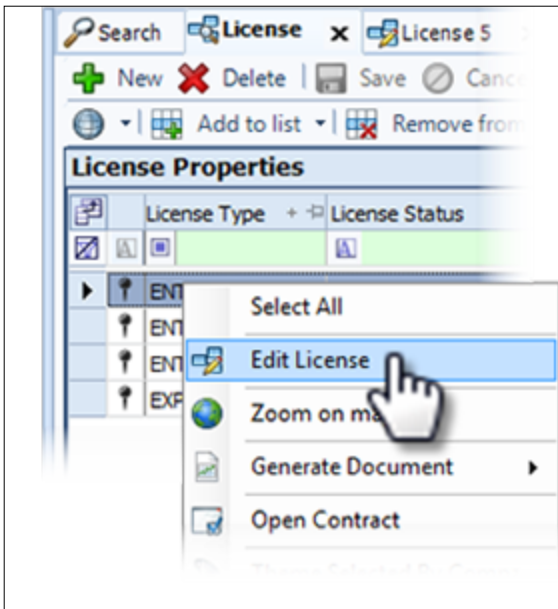
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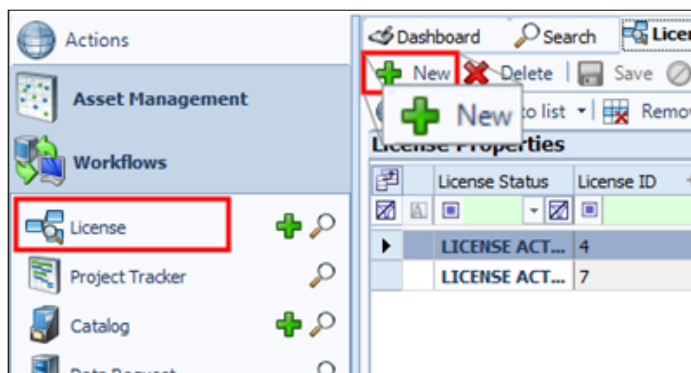
Creating a new license opens the **Editor View** with a blank record.

The tasks for creating a license involve:

- » Adding general information to the **License Properties** grid.
- » Adding seismic and associated products.
- » Creating the cutouts.

To begin a new license and add the general information:

1. Click **License** in the navigation panel to open the module.
2. Click **New** in the workspace toolbar and the **Editor View** opens in a new tab.





Note:

There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

Exploration Archives auto-populates a **License ID** and the **License Status** sets to *Enquiry*.

3. In the **License Properties** area, locate the **Primary Client** field (required) and select the primary client for the license.

The screenshot displays the 'License Properties' form on the left and a map on the right. The form fields include: License ID (9), Primary Client (TALUS TECHNOLOGIES INC.), Primary Client MLA, License Agreement, Parent Primary Client, Type, License Status (ENQUIRY), Data Type, Request Type, Transaction Type, Country, Division, Effective Date, Expiry Date, Sales Rep, and Licensor. The map on the right is titled 'GCS WGS 1984' and shows a geographical area with a scale bar indicating 4000km and 2000mi. The coordinates are X = -15.7928, Y = 57.0825.

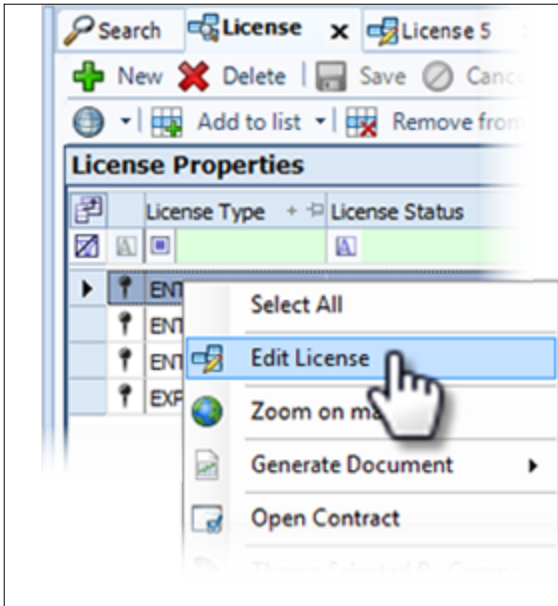
4. In the **Primary Client MLA** field, select the current master license agreement. The options available for this field populate according to the selection you made for the **Primary Client** field.
5. Select the information for the remaining fields in the **License Properties** area, as appropriate. Since the *Enquiry* status is an in-progress status, you can return to the license later to add information as you receive it.
6. Click **Save** and proceed to "Add a survey or product" below.

Add a survey or product

Exploration Archives uses the coverage defined in a cutout to calculate the fees and generate license documentation. The cutout tool provides a variety of features for making selections on a map and creating the cutout.

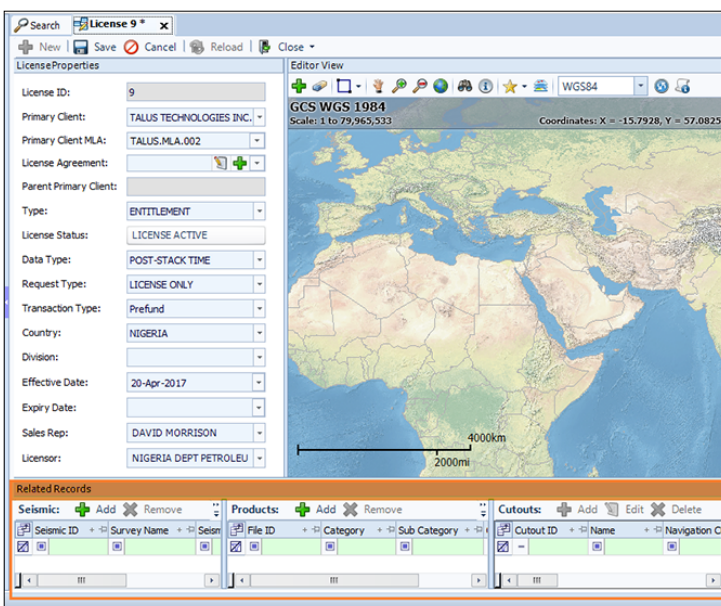
To prepare for creating a cutout, you must first add the seismic survey and/or the product files that the cutout will be derived from. The functionality for adding surveys and products is available in the **Editor View**. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

From the **Editor View**, the lower panel displays the **Related Records** information and allows you to add **Seismic**, the associated **Products** and the **Cutouts**.



From the **Editor View** you can add a full survey or select particular products within a survey.

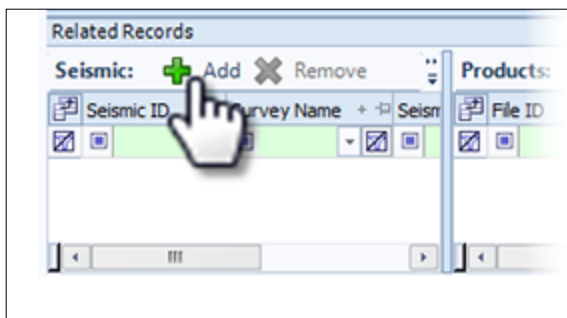


Note:

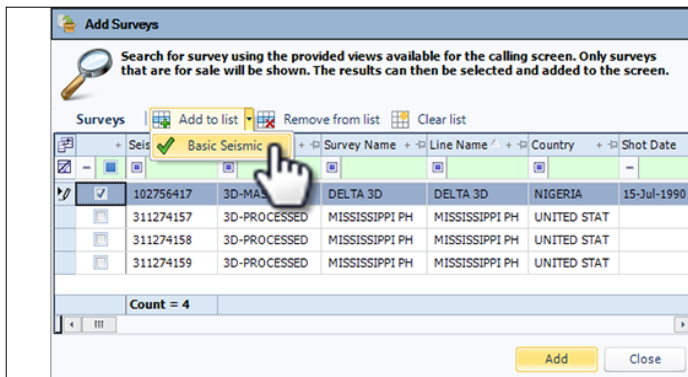
There may be a rare case when starting a new license that all the fields are not available. If this is the case, check the Map panel to make sure that the correct map format appears in the drop-down window. If it isn't the correct format, use the drop-down to change the map to the correct one.

To add a survey:

1. Click **Add** in the **Seismic** grid. The **Add Surveys** window opens as a working grid to search for the survey(s), and add to the license.



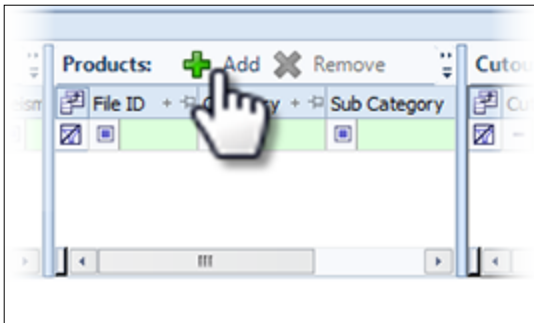
2. Click **Add to list** and select a search.



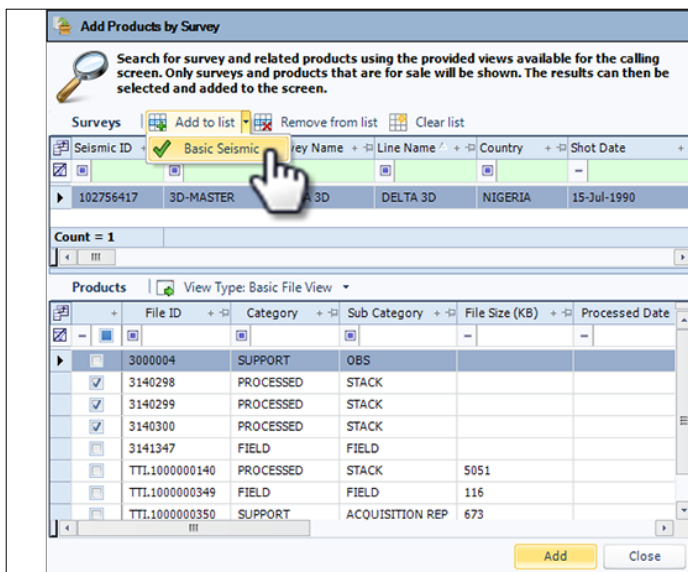
3. Enter your search criteria then click **Search**. The results populate in the **Surveys** grid and displays the surveys available for sale.
4. Select the checkboxes for the survey(s) you want to add to the license and click **Add**. The selected survey(s) add to the **Related Records** area of the license.
5. Repeat these steps to add another survey, or click **Close** if you are done.

To add products:

1. Click **Add** in the **Products** grid. The **Add Products by Survey** window opens as a working grid to search for the survey(s) and generate a list of associated products.



2. Click **Add to list** and select a search.



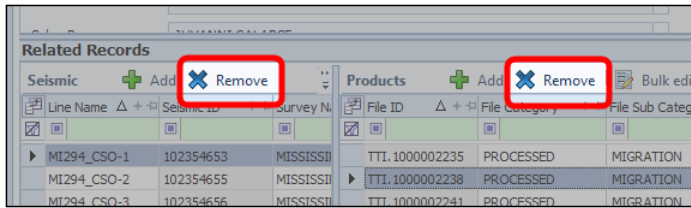
3. In the search window, enter your search criteria and click **Search**. The results populate in the **Surveys** grid with the associated products available for sale in the **Products** grid.
4. Select the check boxes for the product(s) you want to add to the license and click **Add**. The selected product(s) and associated survey adds to the **Related Records** area of the license.
5. Repeat these steps to add another product, or click **Close** if you are done.

Remove a survey or product

To remove a survey or product from a license:

1. Open the License module and locate the license in the **License Properties** grid.
2. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.

3. In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click **Remove**.

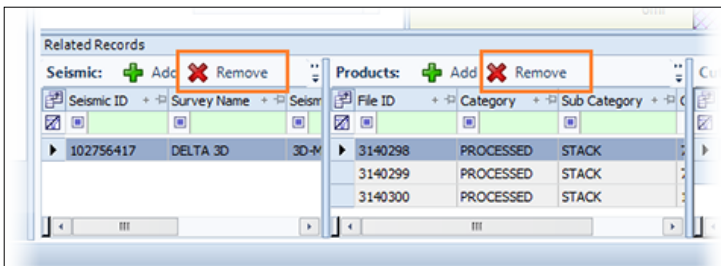


Note:

Removing a seismic survey removes all products associated to that survey.
Removing a product just removes the single product.

To remove a survey or product from a license, open the License module and locate the license in the **License Properties** grid. Right-click on the license to open the context menu and select **Edit License** to open the **Editor View**.

In the **Related Records** area, select the item to remove in the **Seismic** or **Products** grid and click **Remove**.



Note:

Removing a seismic survey removes all products associated to that survey.
Removing a product just removes the single product.

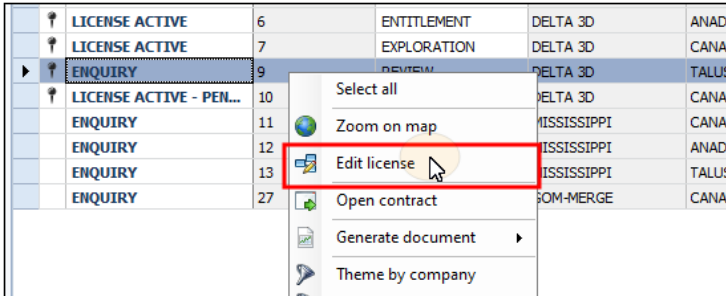
Add a cutout

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request.

To add a cutout, you must first add a survey or product (refer to "Add a survey or product" on page 15).

The functionality for adding a cutout is available in the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, can open the **Editor View** from an existing license.

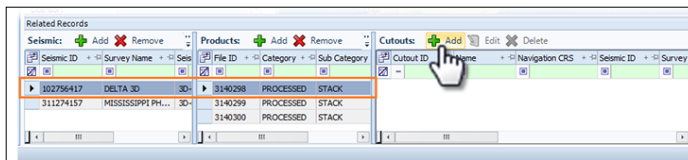
To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

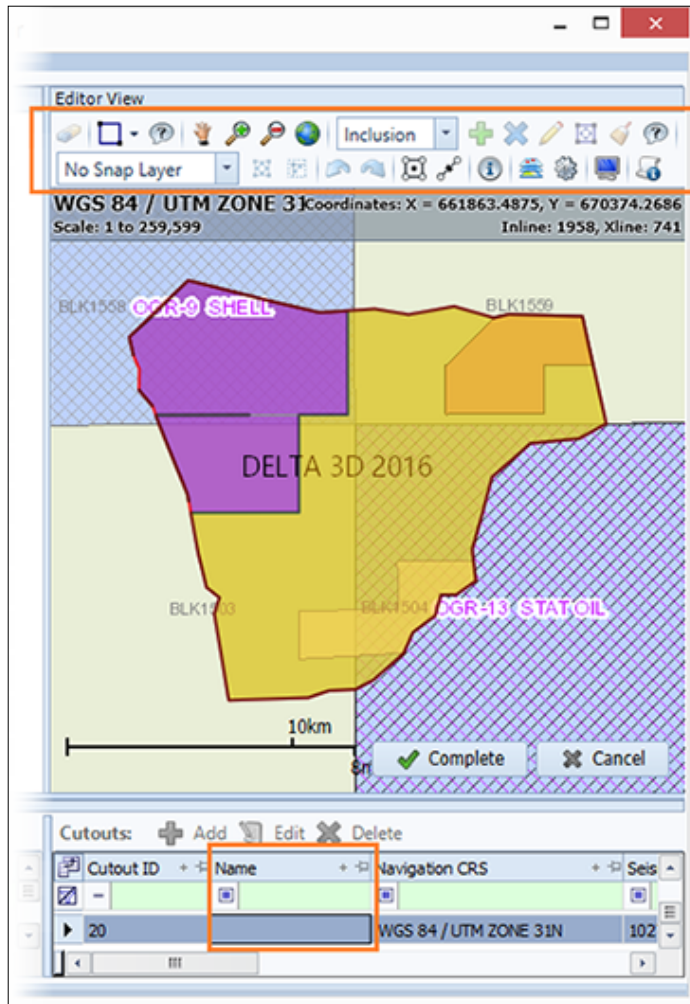
To add a cutout:

1. From the **Editor View**, select the originating seismic or product in the **Related Records**.
2. In the **Cutout** panel, click **Add**.



A new row with an auto-generated **Cutout ID** adds to the **Cutout** panel as a placeholder for the cutout. The map view zooms to the associated survey, and the toolbar changes to include a variety of cutout tools.

3. Add a name to the **Name** column.



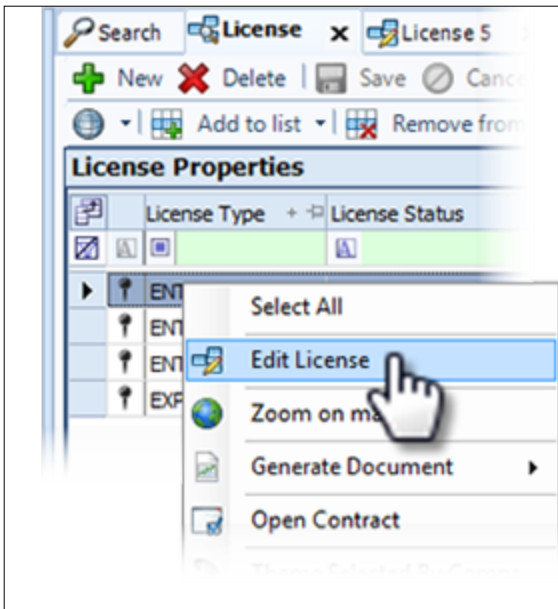
4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 25).
5. When done, Click **Complete**.

The area defined by a cutout is the basis for calculating license fees and generating license documentation. The cutout is derived from a survey or from a product, depending on the client request.

To add a cutout, you must first add a survey or product (refer to "Add a survey or product" on page 15).

The functionality for adding a cutout is available in the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)). Alternatively, can open the **Editor View** from an existing license.

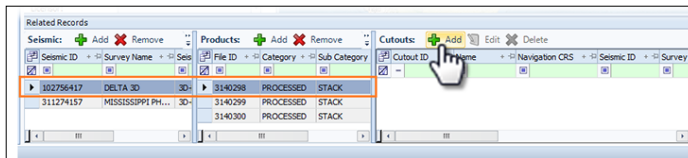
To open the Editor View from an existing license:



Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

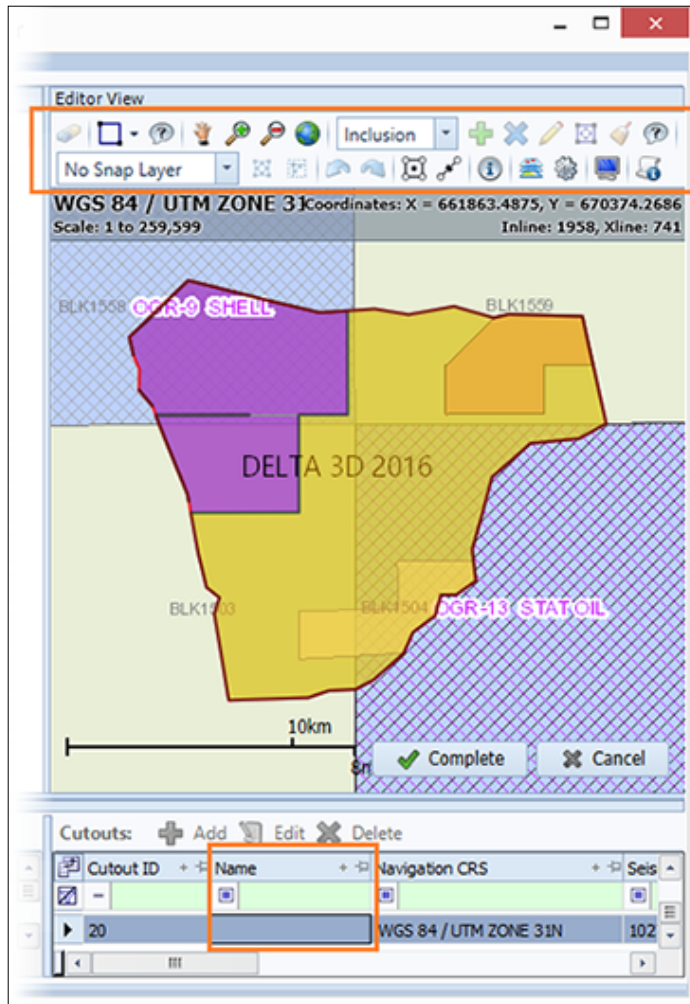
To add a cutout:

1. From the **Editor View**, select the originating seismic or product in the **Related Records**.
2. In the **Cutout** panel, click **Add**.



A new row with an auto-generated **Cutout ID** adds to the **Cutout** panel as a placeholder for the cutout. The map view zooms to the associated survey, and the toolbar changes to include a variety of cutout tools.

3. Add a name to the **Name** column.



4. Use the cutout editor to create the cutout (refer to "Using the cutout editor" on page 25).
5. When done, Click **Complete**.

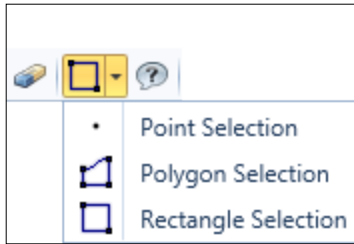
2.4 Creating a cutout

Creating a cutout for a license involves [Using the cutout editor](#) from the **Editor View** of the License module. The cutout editor provides a working platform for creating and modifying a cutout.

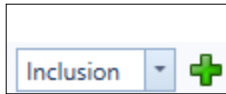
The features available in the cutout editor provide a multitude of options for completing the task of creating a cutout. For a full description of the features refer [Understanding the toolbar](#).

Here is a generic overview of a typical workflow for creating a cutout:

1. Use the selection tools to select features from the survey. The selection you create is a draft for the cutout. After adding the selection as a cutout, you can modify further.



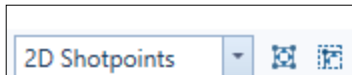
- To add a selection as part of the cutout, decide what type of cutout you are adding; **Inclusion** or **Exclusion**. Select the type and then click **Add**.



- Modify the cutout using the various cutout editing tools. This includes creating more selections to **Add** or **Remove** from the cutout.



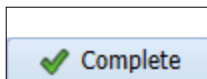
- Use the snapping tools to help set the cutout.



- Open the **Cutout Details** to review the information and edit as needed. Alternatively, you can features in the **Cutout Details** window to import the points or segments instead of drawing the cutout.

Cutout Details						
Search						
Shape Total Points 246 Total Area 46.0958 Area UOM SQUARE KILOMETERS						
Points Blocks Segments						
+ Add - Remove Shapefile Import Export						
Position	X	Y	Inline	Xline	Segment	
4	672346.578671753	660604.967204092	1649	1218	3	
3	672346.578671753	662413.911058919	1719	1202	3	
2	669860.584627207	662413.911058919	1702	1106	3	
1	669860.584627207	660604.967204092	1631	1116	3	

- When the details for your cutout are correct, click **Complete** in the lower right corner of the map and the information adds to the **Cutouts** grid.



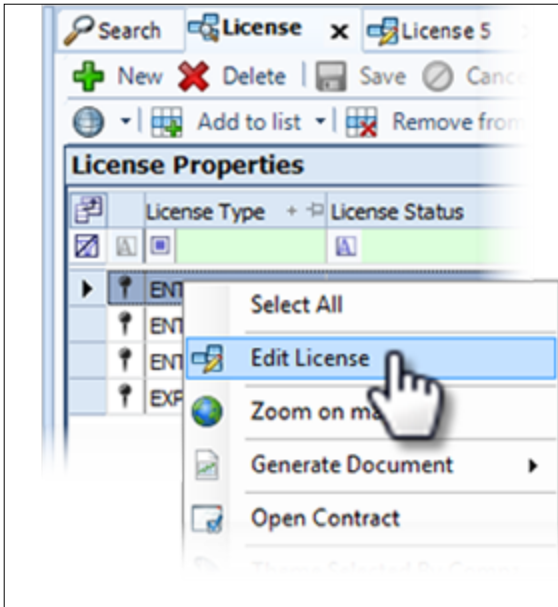
Using the cutout editor

The cutout editor is available from the **Editor View** of a license. Opening the **Editor View** is part of the steps in creating a new license (refer to [Creating a license](#)).

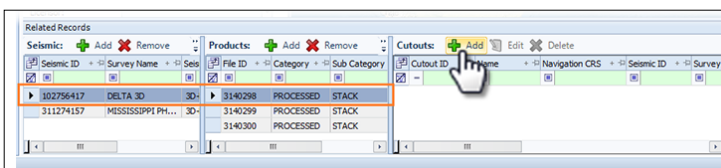
Alternatively, you can open the **Editor View** from an existing license.

To open the Editor View from an existing license...

Locate the license in the **License Properties** grid of the License module. Right-click on the license to populate the context menu and click **Edit License**. The **Editor View** opens in a new tab and displays the license detail.

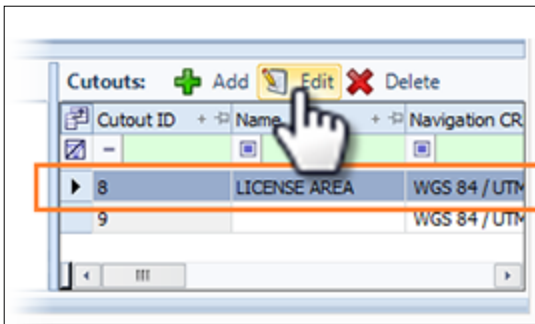


From the **Editor View**, select the originating seismic or product in the **Related Records** and click **Add** in the **Cutout** panel.

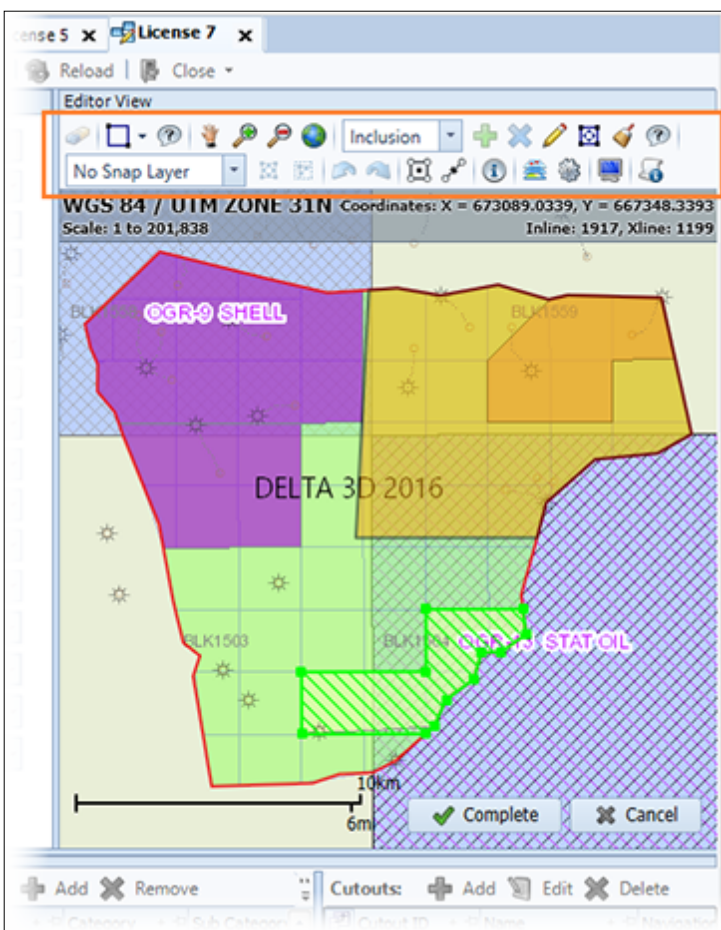


To edit an existing cutout, select the cutout in the **Cutouts** panel and click **Edit**.

To delete a cutout, select the cutout in the **Cutouts** panel and click **Delete**.



Whether adding a new cutout or editing an existing cutout, the cutout editor opens with a new set of tools in the map toolbar specific for cutouts. The map automatically zooms to the associated survey. For an existing cutout that you are editing, the survey displays with the cutout in a selected mode. In this screenshot, the cutout selected for editing displays with a green border.

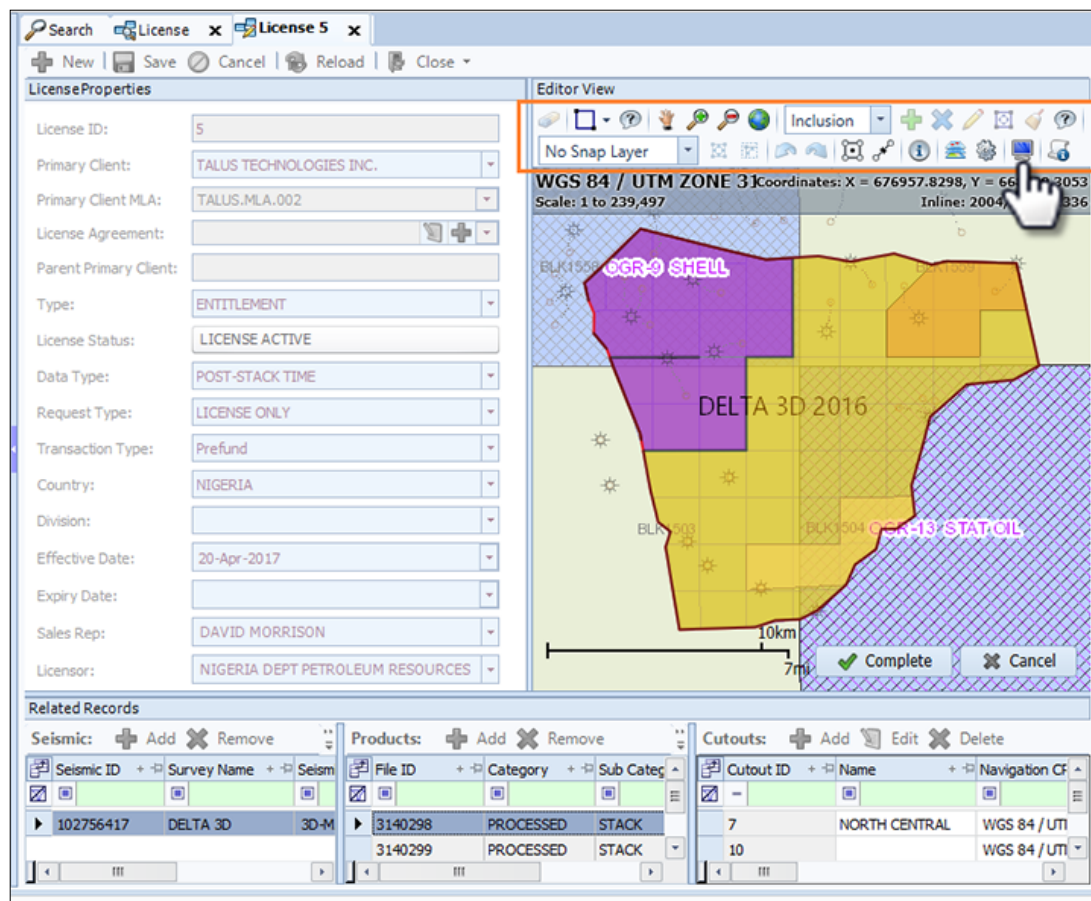


Choosing a view

The cutout editor offers two views for working on a cutout: the default view and the fullscreen view.

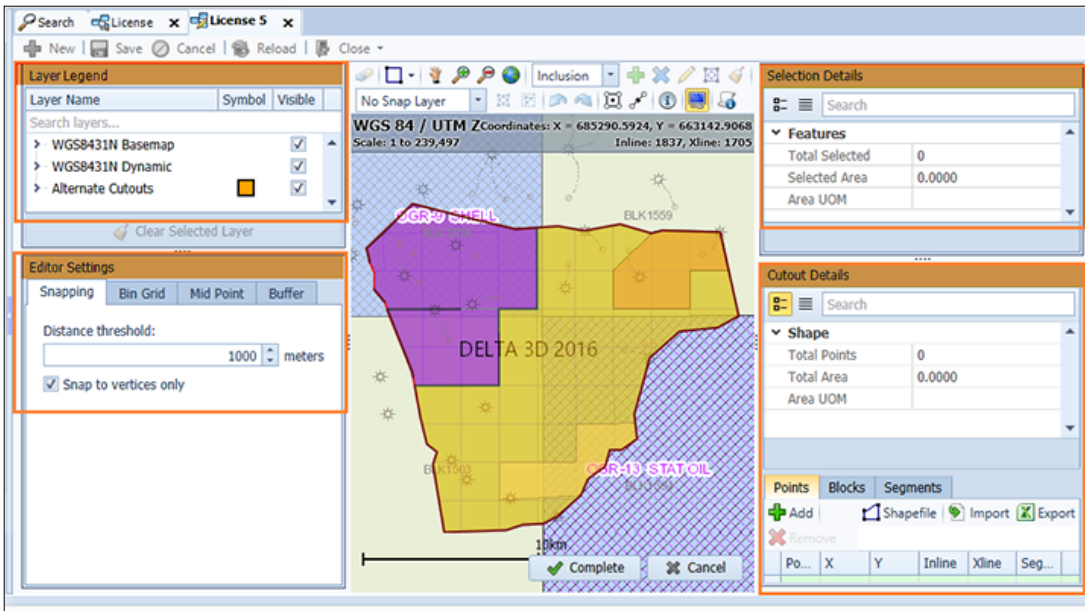
Editor View as default

The default view maintains the layout of the **Editor View** with the **License Properties** area, the **Related Records** area and the map panel. The default view opens with the map zoomed to the selected survey and new items in the toolbar for working with cutouts.



Fullscreen view

The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with specific toolbar items open by default. To open the fullscreen view, click fullscreen  in the map toolbar. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.



The same cutout-detail panes docked in fullscreen are accessible from the toolbar in the default view. In the default view, the panes open as floating windows over the map.

Access the panes in the default view using these toolbar items:



Layer Legend: Opens the **Layer Legend** with ability to modify.



Editor Settings: Open to specify the settings for snapping, bin grids, mid point and buffers.



Selection Details: View details of the selection features.



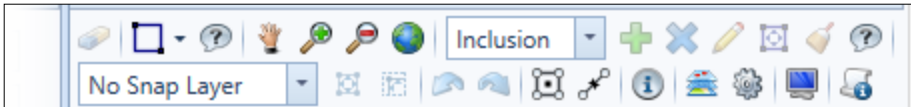
Cutout Details: View details of the cutout including point, block and segment detail.

Understanding the cutout toolbar

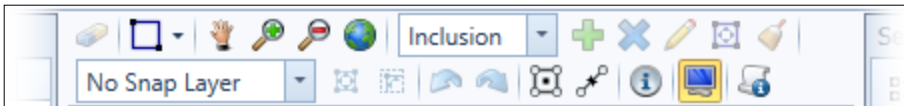
After opening the **Editor View** for a cutout ("Using the cutout editor" on page 25), the map automatically zooms to the associated survey. For editing an existing cutout or adding a new one, the **Cutout Editor** displays a set of tools in the map toolbar specific for cutouts.

If you click fullscreen  in the map toolbar, the fullscreen view opens with specific toolbar items opened by default; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**. The fullscreen view omits those items from the toolbar, while the default view displays the items in the toolbar for you to open individually.

Toolbar in default view:



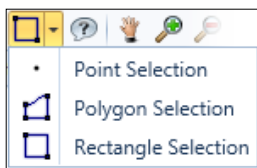
Toolbar in fullscreen view:



Cutout tools and functionality:



- » **Fullscreen:** Click to open the **Fullscreen** view. The fullscreen view offers a workspace specifically designed for working with cutouts. The fullscreen view opens with the map in the centre panel with two cutout tools docked on each side; **Layer Legend**, **Editor Settings**, **Selection Details** and **Cutout Details**.



- » **Selection:** Selects an area, or points, from the survey displayed on the map. Use this tool to create the base of your cutout. The selection you create is a draft for the cutout. To create the selection as part of your

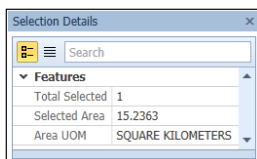
cutout, you must add  the selection to the cutout.



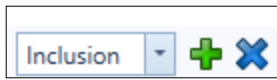
- » **Midpoints:** Click to display the midpoints on your selection.



- » **Selection Details:** Click to open the **Selection Details** window.



- » **Erase Selection:** Erases the selection(s) that you created.



- » **Add or Remove:** Adds the selection to make it part of the cutout or removes the selection from the cutout.
To add the selection, decide what type of cutout you are adding;

Inclusion or Exclusion. Select the type and click **Add** .

To use the selection to remove features from a cutout, select the type of cutout you are removing from (**Inclusion** or **Exclusion**) and click

Remove .

You can use this feature repeatedly to continue adding to and removing from the cutout.



- » **Manual edit:** Select the tool and your cursor changes to **Manual Edit**



. With this cursor, click and drag points to modify the cutout.



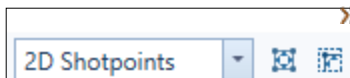
- » **Clear cutout:** Clears the entire cutout type. Select the cutout type and then click **Clear cutout**.



- » **Undo and Redo:** Click to undo or redo your last edit to a cutout.



- » **Cutout Details:** Opens the **Cutout Details** window.



- » **Snap to:** Use snapping to help set your cutout. Select the snapping layer from the drop down. Then select one of the snapping tools:



Snaps all cutout points to the points of the selected layer.



Snaps selected cutout points to the points of the selected layer.

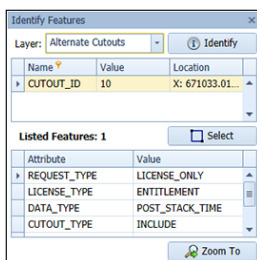
- » **Bin grids:** Click to display the bin grids for the survey. Zoom in on the map to view more bin grid detail.

- » **Editor Settings:** Click to open the **Editor Settings** window.



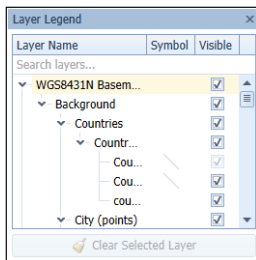
- » **Identify:** Identify the features of particular items on the map. Click to

activate the **Identify** cursor . Click and drag to select features to identify. The **Identify Features** window opens with more options.





- » **Layers:** Click to open the layers legend. In the layers legend, select and deselect the checkboxes to display different map layers.



- » **Pan:** Click and drag to pan the map. Double-click to zoom in slightly.



- » **Zoom in:** Draw an area on the map to zoom the view to the specified extent.



- » **Zoom out:** Draw an area to quickly zoom out.



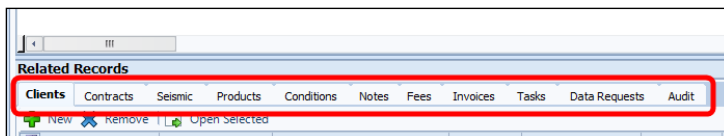
- » **Full map:** Click to expand the view to the full extent of the map.



- » **Troubleshooting log:** Click to display the technical actions of Exploration Archives. This is useful for your administrator when resolving issues.

2.5 Manage Related Records

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



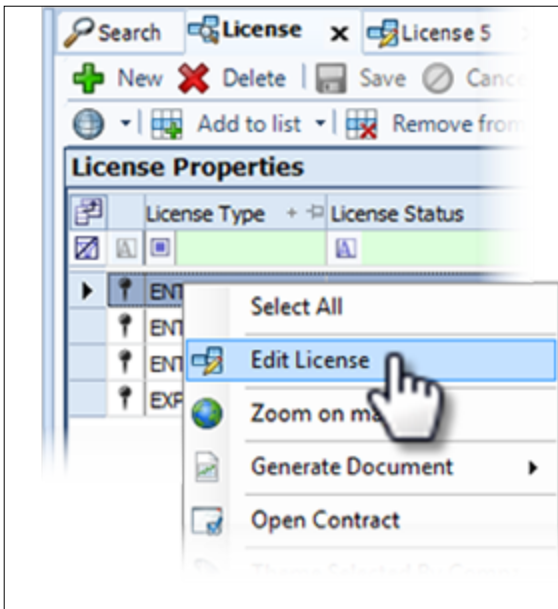
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to "Data Request" on page 177.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open Editor View...

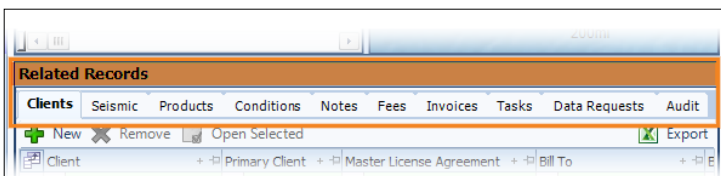
To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "Add a survey or product" on page 15 and "Add a cutout" on page 19.



The tabs that allow direct editing include:

- » [Clients](#)
- » [Conditions](#)
- » [Notes](#)
- » [Fees](#)
- » [Invoices](#)
- » [Tasks](#)

Information associated to a license selected in the **License Properties** grid displays in the **Related Records** panel.



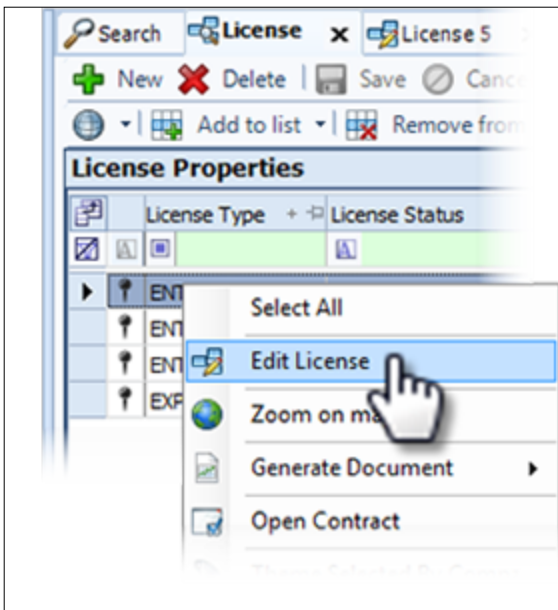
The detail in the **Related Records** tabs is available for editing directly in each tab, with the exception of **Data Request**, **Seismic** and **Products**.

To edit the **Data Request** detail, refer to "Data Request" on page 177.

To add or edit detail in the **Seismic** and **Products** tabs, you must first open the **Editor View**.

To open Editor View...

To open the **Editor View**, right-click on the license to open the context menu and click **Edit License**. The **Editor View** opens in a new tab with the **Seismic** and **Products** (and **Cutouts**) detail available for editing. For further detail, refer to "Add a survey or product" on page 15 and "Add a cutout" on page 19.



The tabs that allow direct editing include:

- » [Clients](#)
- » [Conditions](#)
- » [Notes](#)
- » [Fees](#)
- » [Invoices](#)
- » [Tasks](#)

Assign clients to a license

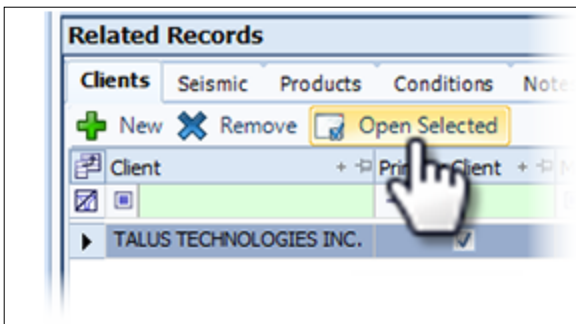
The **Clients** tab of the **Related Records** is directly linked to the records in the **Business Associate** module.

When assigning a Client, the general information automatically generates from the existing business associate (BA) detail.

To edit an existing business associate record...

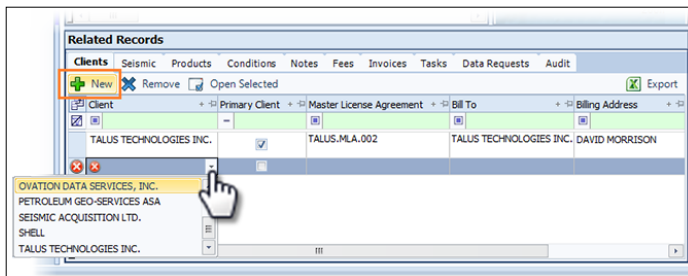
Exploration Archives 4.5 - Workflows

Select the Client in the grid and click **Open Selected**. The business associate record opens in the **Business Associate** module. Edit as required and save.



To assign a Client:

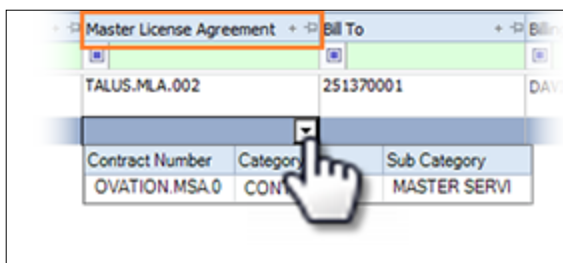
1. Open the **Clients** tab and click **New**. A new row adds to the grid.
2. In the **Client** column, click the down arrow to open the list of existing Client records. Locate the target Client and select. The Client name adds to the grid. The options available to select for the other columns become available according to the existing record.



Note:

If you are adding one Client, select the checkbox in the **Primary Client** column. If you are adding more than one Client, select one of the clients as the **Primary Client**.

3. In the **Master License Agreement** column, click the down arrow and select the relevant agreement.



1. For the billing and shipping information, click the down arrow and select the correct information from the list.

Name	Contact Name	Address	Phone
OVATION DATA SER	GREGORY SERVOS		713 464 1300
OVATION DATA SERV	STEVE MURPHY		

- To add additional shipping information, hover over the **Shipping Comments** cell and click the **Edit** icon to open the text entry window.

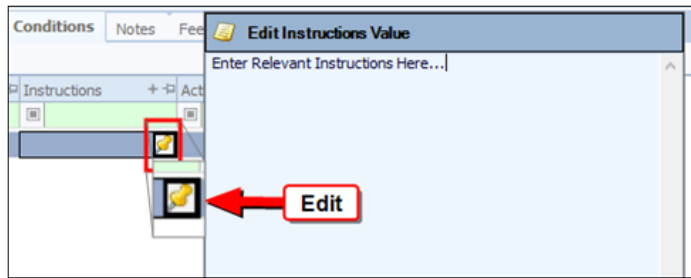
- Enter the relevant information and click **OK**.
- Double-click on each of the remaining cells to activate, and enter the contact information, AFE, PO number and references number, as required.
- When complete, click **Save** in the main toolbar.

Use conditions

The **Conditions** tab is for recording a condition that is associated to a license. Exploration Archives automatically generates a notification reminder to the assignee according to the **Action Date** and **Expiry Date** associated to the condition.

To add a condition:

- Open the **Conditions** tab and click **New**. A new row adds to the grid.
- Select the **Condition Type**.
- Select the **Condition Status**.
- To enter the instructions, hover over the **Instructions** cell and click edit to open the text edit window.



Enter the instructions and click **OK**.

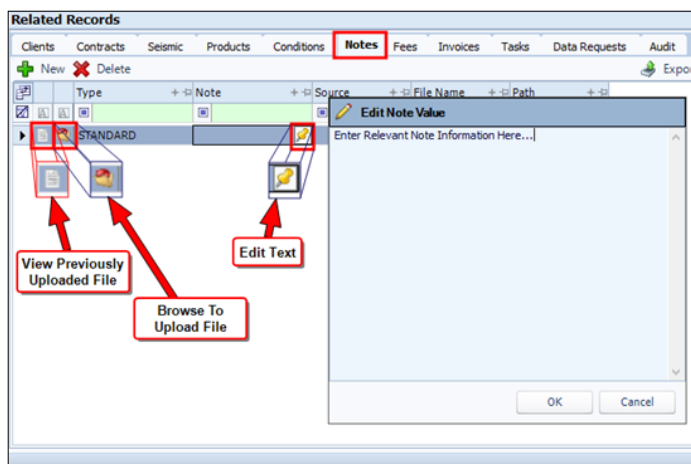
5. Enter the **Action Date** and the **Expiry Date**.
6. Select the responsible person in the **Assigned To** column.
7. Click **Save** in the main toolbar.

Add notes

The **Notes** tab is for adding files and notes to a license.

To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).

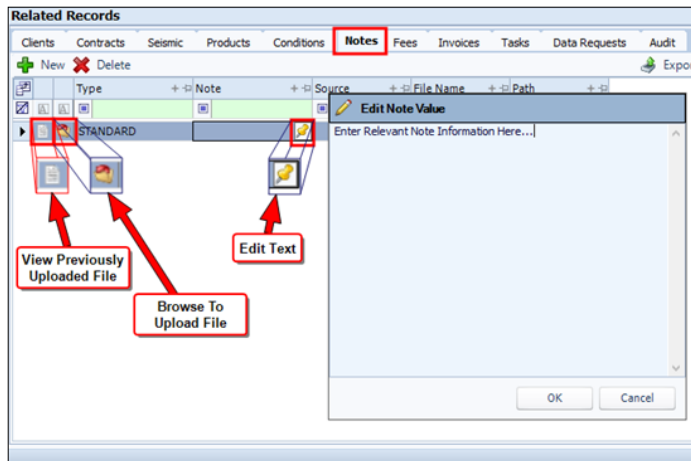


3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.
5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.

The **Notes** tab is for adding files and notes to a license.

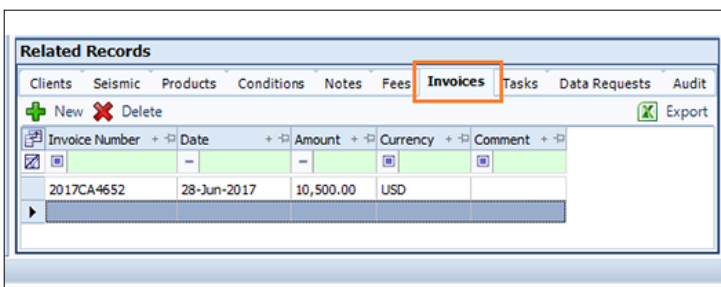
To add a file or note:

1. Open the **Notes** tab and click **New**. A new row adds to the grid.
2. The leading columns of a row provide the option to click and browse for a file to upload or view a file (if already uploaded).
3. If you are uploading a file, click **browse** and locate the file to upload.
4. Select the file and click **Open**. The file loads to the **Notes** grid with the **File Name** and **Path** included.
5. To manually enter a comment or instructions, hover over the **Note** cell and click **Edit Text** to open the text edit window. Enter the note and click **OK**.
6. Click **Save** in the main toolbar.



List invoices

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.

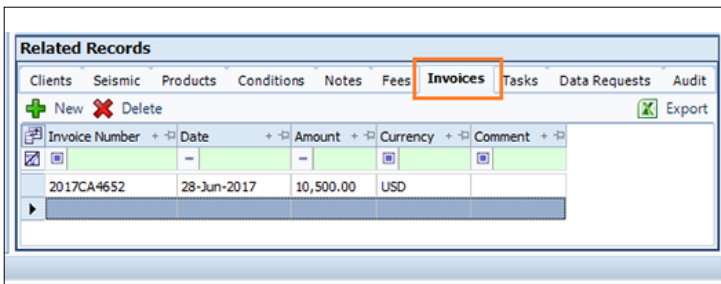


To add a reference to an invoice:

1. Open the **Invoices** tab then click **New**. An empty row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.
4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

The **Invoices** tab maintains the list of invoices associated to a license. This list is a reference for investigating further information.

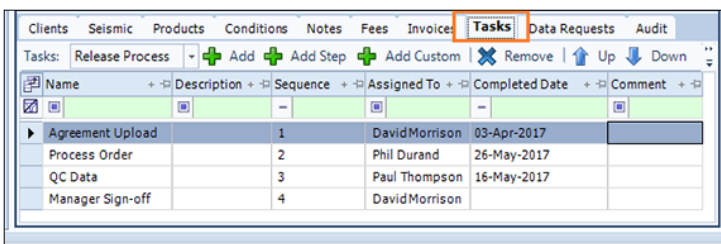
To add a reference to an invoice:



1. Open the **Invoices** tab then click **New**. A new row adds to the grid.
2. In the **Invoice Number** column, enter the number as it appears on the invoice.
3. Enter the date of the invoice in the **Date** column.
4. Enter the total cost and currency in the **Amount** and **Currency** columns.
5. Double-click the comment cell and manually enter a comment, if applicable.
6. Click **Save** in the main toolbar.

Create tasks for a license

The **Tasks** tab for the License module is in the **Related Records** area.



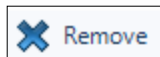
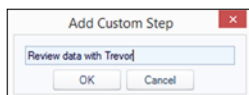
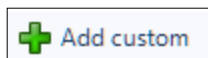
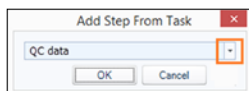
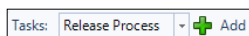
Tasks provide visibility for managing user tasks. Users with permission can create and assign tasks as required for the catalog session data request.

Tasks for a typical catalog session data request are available in the predefined task list. Adding a predefined task, generates a list of the required steps to complete the catalog session data request. Using the toolbar, add, remove and reorder the steps as needed. Use the **Add custom** option for creating a custom steps. Use the **Description** field to add details of a task. In the **Assigned To** column, assign each task to the responsible party.

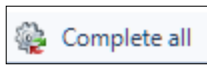
After completing a task step, the assigned user enters a date in the **Completed Date** column. To log additional information associated to a task step, the assignee can use the **Comment** column.

The **Tasks** feature automatically sends a notification to the assigned user in accordance with the system trigger. For example, the system may be configured to keep the task on hold until the catalog session data request is at a particular status. Once the first step is triggered, notifications send sequentially as each step is completed. Setting the completion date for task step triggers the notification for the next step.

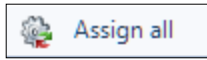
Tasks toolbar functionality:



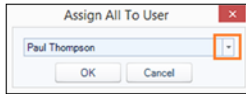
- » **Add:** Adds a task that includes a sequence of predefined steps. In the **Tasks** field, click the down arrow to view the tasks options. Select a tasks and click **Add**. The set of steps required to complete the task adds to the grid.
- » **Add step:** Adds an individual step from the predefined tasks. In the **Tasks** tab, from the **Tasks** field in the toolbar, select the task that has the target step. Click **Add Step** and the **Add Step From Task** window opens. Click the down arrow and select the associated step. Click **OK**. The task step adds to the grid.
- » **Add custom:** Adds a custom step. Click **Add custom** to open the **Add Custom Step** window. Click in the entry field and enter a name for the step. Click **OK**.
- » **Remove:** Removes a step from the grid. Select the step in the grid. Click **Remove**. The step instantly removes from the grid.
- » **Up and Down:** Moves the task up or down in the sequence order. Select the task and click **Up** or **Down** to move the task step to a new location in the sequence. The task moves in the grid and the number in the **Sequence** column changes accordingly.



- » **Complete all:** Adds the current date to the **Completed Date** column for all tasks. Click **Complete all** and current date instantly adds to the **Completed Date** column.



- » **Assign all:** Assigns all task steps to one individual. Click **Assign all** to open the **Assign All to User** window. Click the down arrow and select the assignee. Click OK. The **Assigned To** column updates for all task steps with the specified assignee name.



- » To assign individual task steps, select the assignee using the drop-down menu in the **Assigned To** column.

2.6 Manage fees

The License module uses built-in algorithms to calculate fees. The fees are based on the length, area or blocks cut from a survey for the license. The fees calculate using the price set at the seismic survey level for the particular survey.

The **Fees** tab of the **Related Records** area populates the length, area or blocks according to the cutout and the price as specified for the survey.

Item	Quantity	Quantity Type	Estimated Price Per Quantity	Estimated Price	Actual Price Per Quantity	Actual Price	Currency	Covered By Prepurchase
DELTA 3D	105,4248	SQUARE KILOM...	105,000.00	11,174,604.00	105,000.00	11,174,604.00	USD	
Discount						-10,000.00	USD	

The **Fees** tab includes the option to cover the fees using a prepurchase amount, if the client has an existing prepurchase contract. A prepurchase contract must be registered to the client using the Business Associate module.

Features available for managing license fees:

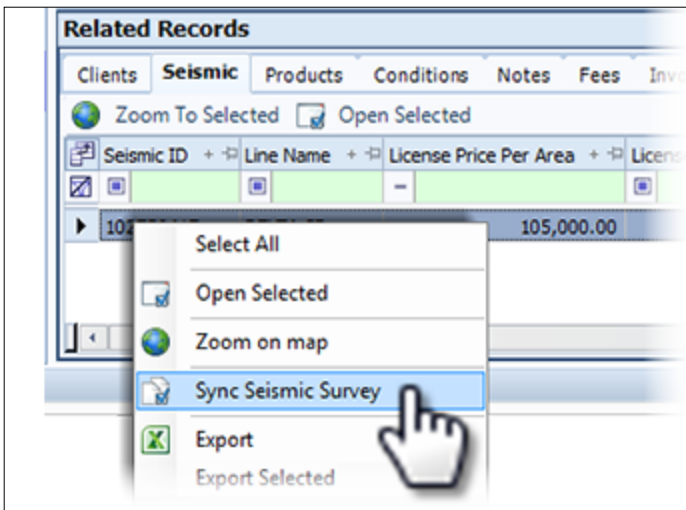
- » [Calculating fees](#)
- » [Adding a custom fee](#)
- » [Using a prepurchase](#)

Calculate fees

The Fees tab of the Related Records area provides an auto-calculation tool to populate license fees. The price used for calculating the fees must pre-set in the Seismic module. Be sure to sync the seismic survey with the license to ensure the license obtains the current pricing.

To sync the seismic survey...

In the **Related Records** area of the License module, open the **Seismic** tab. Right-click on the seismic record and select **Sync Seismic Survey**. All license-related columns for the survey update to the current information.



To populate fee, click **Populate Fees**. The values for the related columns in the **Fees** tab automatically display.

Quantity	Quantity Type	Estimated Price Per Quantity	Estimated Price	Actual Price Per Quantity	Actual Price
148.2539	SQUARE KILOMET...	105,000.00	15,566,659.50	105,000.00	15,566,659.50 U

The **Estimated Price Per Quantity** column populates the price as set from the Seismic module. The quantity multiplied by the price displays in the **Estimated Price** column. The estimated values replicate to populate the **Actual Price Per Quantity** and the **Actual Price**. The *actual* values are open for editing as required.

Add a custom fee

The **Fees** tab includes the option of creating a custom fee entry.

To create a custom fee:

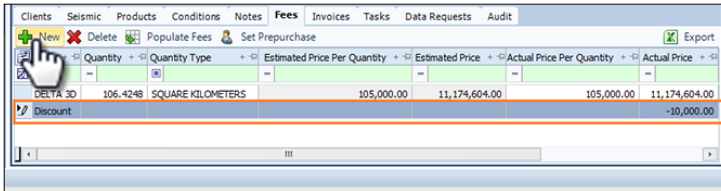
Quantity	Quantity Type	Estimated Price Per Quantity	Estimated Price	Actual Price Per Quantity	Actual Price
106.4248	SQUARE KILOMETERS	105,000.00	11,174,604.00	105,000.00	11,174,604.00
	Discount				-10,000.00

Exploration Archives 4.5 - Workflows

1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

The **Fees** tab includes the option of creating a custom fee entry.

To create a custom fee:



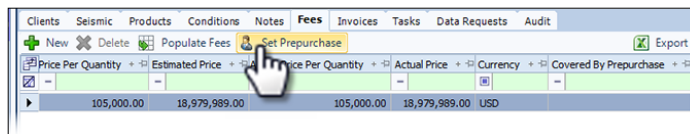
1. Click **New**. A new row with empty cells adds to the grid.
2. Double-click a cell to enter new information.
3. Click **Save** in main toolbar.

Use a prepurchase

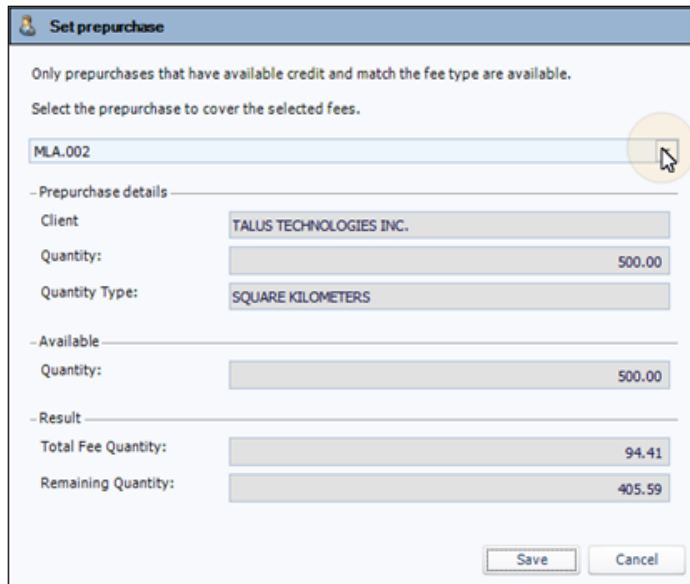
The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.



2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.



Set prepurchase

Only prepurchases that have available credit and match the fee type are available.
Select the prepurchase to cover the selected fees.

MLA.002

Prepurchase details

Client: TALUS TECHNOLOGIES INC.

Quantity: 500.00

Quantity Type: SQUARE KILOMETERS

Available

Quantity: 500.00

Result

Total Fee Quantity: 94.41

Remaining Quantity: 405.59

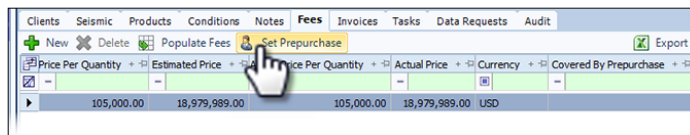
Save Cancel

3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The window closes and the calculated amount displays in the **Covered By Prepurchase** column.

The **Fees** tab in the License module includes the option to cover the fees using a prepurchase amount. The prepurchase contract details must be registered with the primary client in the Business Associate module.

To set the prepurchase:

1. In the **Fees** tab, select the item applicable for the prepurchase.



Price Per Quantity	Estimated Price	Price Per Quantity	Actual Price	Currency	Covered By Prepurchase
105,000.00	18,979,989.00	105,000.00	18,979,989.00	USD	

2. Click **Set Prepurchase**. The **Set Prepurchase** window opens.

Set prepurchase

Only prepurchases that have available credit and match the fee type are available.
Select the prepurchase to cover the selected fees.

MLA.002

Prepurchase details

Client: TALUS TECHNOLOGIES INC.

Quantity: 500.00

Quantity Type: SQUARE KILOMETERS

Available

Quantity: 500.00

Result

Total Fee Quantity: 94.41

Remaining Quantity: 405.59

Save Cancel

3. In the top field, click the down arrow and select the prepurchase to apply to the license. The associated information displays as a preview in the **Prepurchase Details**, **Available** and **Result** areas.
4. Click **Save**. The window closes and the calculated amount displays in the **Covered By Prepurchase** column.

Set license price



Note:

The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according to the prices set for the survey in the Seismic module.

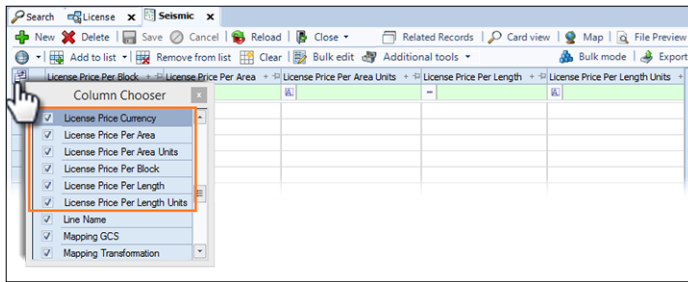
To set the license price:

1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.



Note:

If the license price columns are not in the grid, use the **Column Chooser** to add them. Click the column chooser icon  (upper left corner of the grid) to open the list of available columns. Drag and drop the license columns from the **Column Chooser** to the grid.



3. Enter the license price details for each column, as applicable:



Note: When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency

This is a drop-down list where you can select the currency the License Price is in.

License Price Per Area

Double-click in this cell to enter an amount that reflects the cost of the license per area.

License Price Per Area Units

This field is a drop-down list that allows you to select the units of measurement for the License per Area.

License Price Per Block

Double-click in this cell to enter an amount for the License price per block of land.

License Price Per Length

Double-click in this cell to enter an amount for the License price per length of land.

License Price Per Length Units

This is a drop-down list that lets your select the units of measurement

4. Click **Save**.

The License module includes a calculation tool that populates license fees for seismic that is for sale. The fees calculate according the prices set for the survey in the Seismic module.

To set the license price:

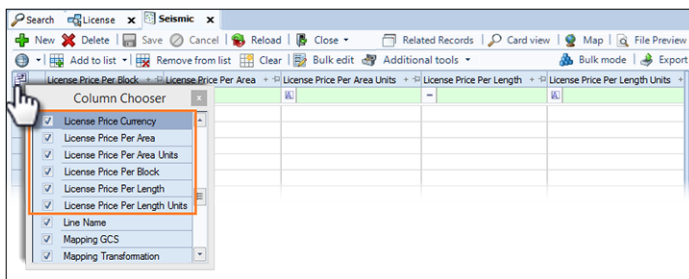
1. Select the record in the Seismic module.
2. Locate the license price columns in the main grid.



Note: If the license price columns are not in the grid, use the **Column Chooser** to add them.

Click the column chooser icon  (upper left corner of the grid) to open the list of available

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 **Note:** When entering values that require a decimal amount you need to type the decimal.

Licence Price Currency

This is a drop-down list where you can select the currency the License Price is in.

License Price Per Area

Double-click in this cell to enter an amount that reflects the cost of the license per area.

License Price Per Area Units

This field is a drop-down list that allows you to select the units of measurement for the License per Area.

License Price Per Block

Double-click in this cell to enter an amount for the License price per block of land.

License Price Per Length

Double-click in this cell to enter an amount for the License price per length of land.

License Price Per Length Units

This is a drop-down list that lets your select the units of measurement

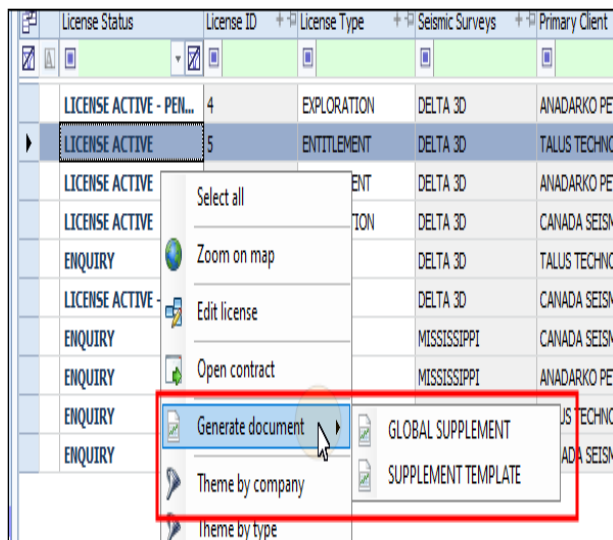
4. Click **Save**.

2.7 Generate documentation

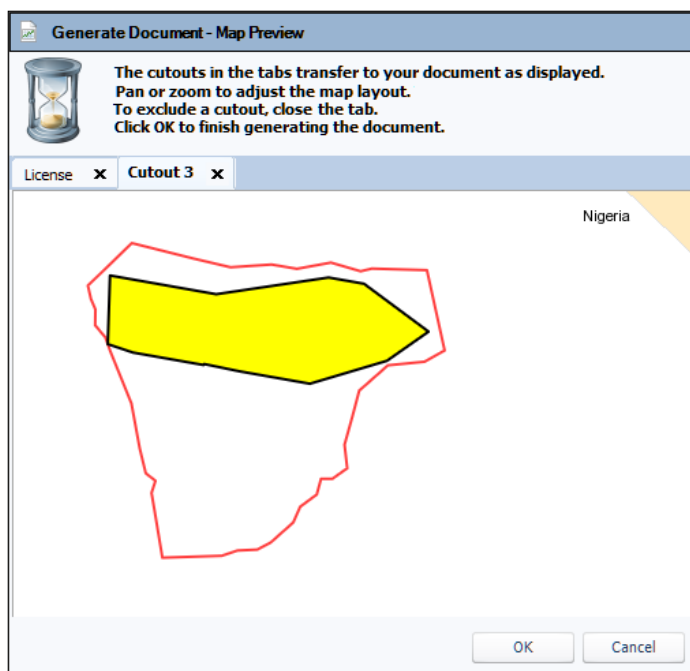
The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information into an editable Word document. Potential templates available may include License Contract, Data Delivery Details, Standard License Agreement, X,Y Listing, Data Request Details and any other custom configured template.

To generate a document:

1. Open the License module and locate the target license in the **License Properties** grid.
2. Right-click on the target license to open the context menu. Point to **Generate document** and then select the template to use to generate the document.



A preview of the associated map images open in a new window.



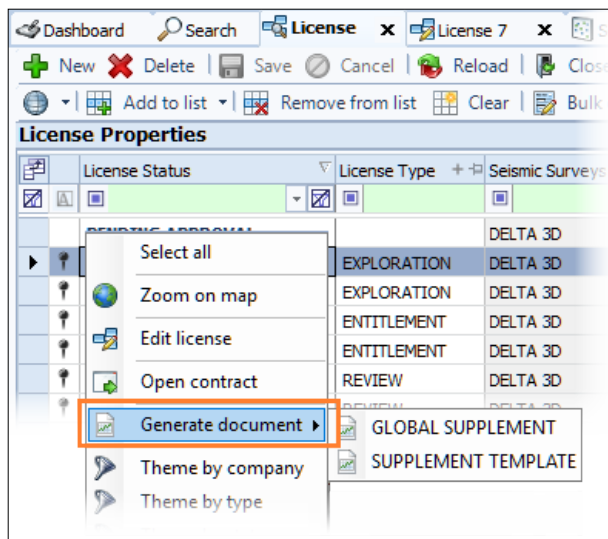
3. In the preview window, the license and cutouts display in the tabs. Click each tab to view the images. Pan or zoom to edit the display of the image as appropriate. To omit an image from the document, click the X to close the tab.
4. To generate the document, click **OK**. Microsoft Word opens with the license and cutout images and any other database tags as specified for the template. Edit as required.

The document tool in the License module generates license-related documentation specific for your company. The templates use database tags to populate information

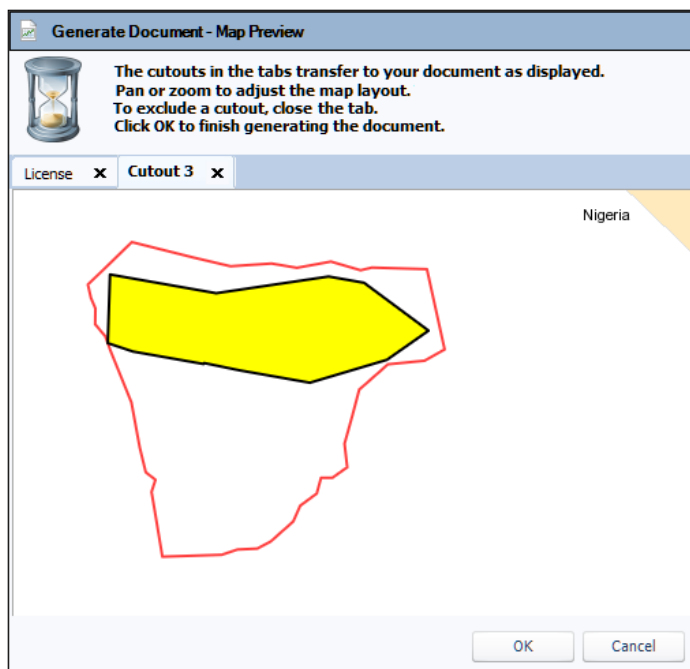
into an editable Word document. Potential templates available may include License Contract, Data Delivery Details, Standard License Agreement, X,Y Listing, Data Request Details and any other custom configured template.

To generate a document:

1. Open the License module and locate the target license in the **License Properties** grid.
2. Right-click on the target license to open the context menu. Point to **Generate document** and select the template to use to generate the document.



A preview of the associated map images open in a new window.



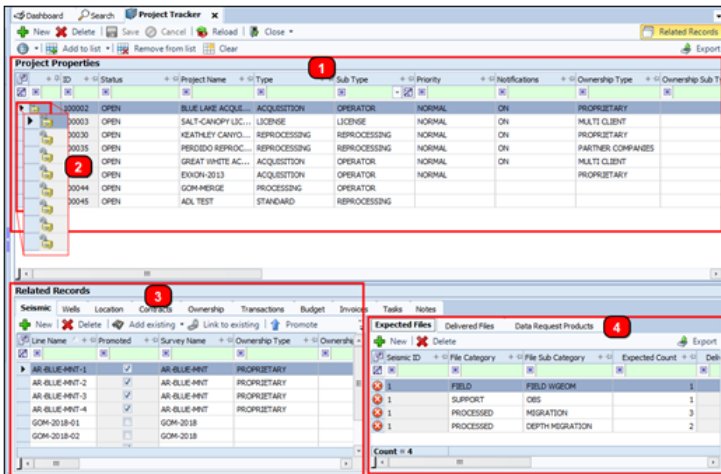
3. In the preview window, the license and cutouts display in the tabs. Click each tab to view the images. Pan or zoom to edit the display of the image as appropriate. To omit an image from the document, click the X to close the tab.
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3.0 Project Tracker

Project Tracker provides complete visibility for organizing and monitoring seismic projects including acquisitions, licenses, processing and other custom types specific to your company requirements.

Project Tracker provides quick linking to existing data and cross-module updating.

3.1 Understanding the screen layout



1. **Project Properties:** This grid lists each project with associated detail in various columns.
2. **Soft Lock:** Project Tracker incorporates a soft-lock feature that prevents simultaneous editing from more than one user,.

The leader column of a row displays the lock status for the project.

- » An unlocked project is available for you to edit details in the **Project Properties** grid or the **Related Records**.
- » When you begin to edit an unlocked project, you obtain the lock and others see that the project has a soft-lock.

3. **Related Records:** Displays the data details and administrative information regarding a selected project.
4. The **Seismic** tab in the **Related Records** panel includes a secondary panel for monitoring the progress of the project deliverables.

This Panel is divided into the following tabs:

- » **Expected Files:** A list of files that are expected to be delivered for the selected seismic.
- » **Delivered Files:** The Delivered files tab will list files in the linked "Catalog" on page 70. When the session is set to Uploaded, users can edit the details with **Edit Workstation**
- » **Data Request Products:** This grid displays all the items from Data Requests.

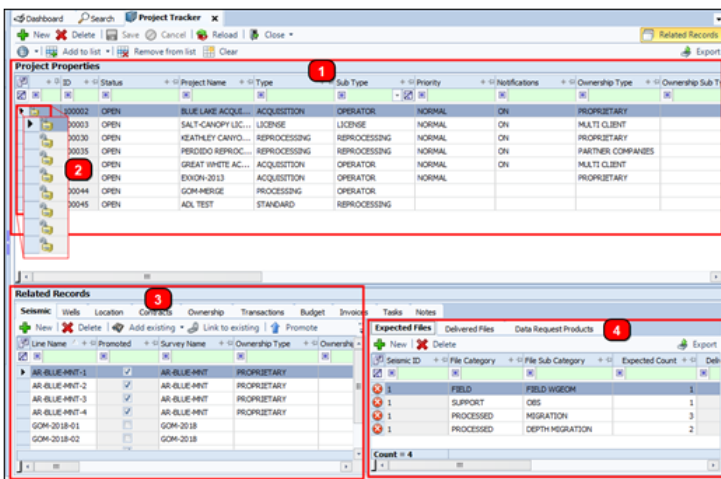
Project Tracker provides complete visibility for organizing and monitoring seismic projects including acquisitions, licenses, processing and other custom types specific to your company requirements.

Project Tracker provides quick linking to existing data and cross-module updating.

New in this version:

- » [Added a tool to allow adding of an existing Contract to a Project.](#)
- » Added an Import tool for expected files and expected media.

3.2 Understanding the screen layout



1. **Project Properties:** This grid lists each project with associated detail in various columns.
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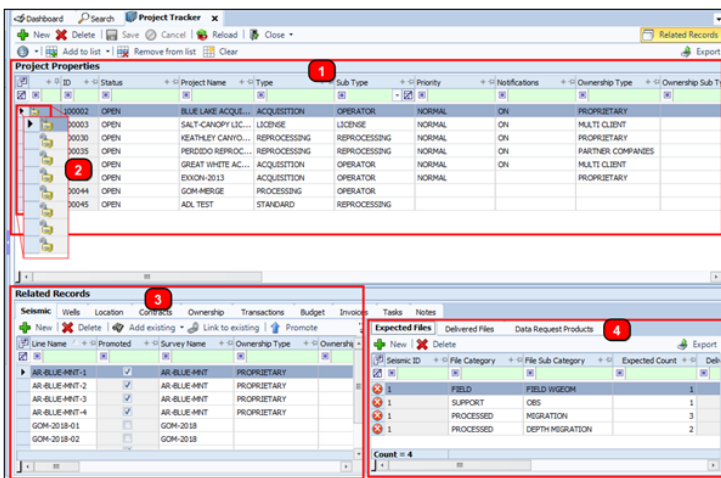
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- » **Data Request Products:** This grid displays all the items from Data Requests.

3.4 Create a new project

Creating a project begins when you receive a contract and have the initial details. Using the details you receive with the contract, you can create a project and enter the logistics in the **Project Properties** grid. After entering the project properties, you can add preliminary information in the **Related Records** area, and edit as the project progresses.

To create a new project and enter the project properties:

1. Open **Project Tracker** and click **New**. The **Create New Project** window opens.

2. Select a **Status** for the project and enter a **Project Name**.
3. Select the project **Type**.



Note:

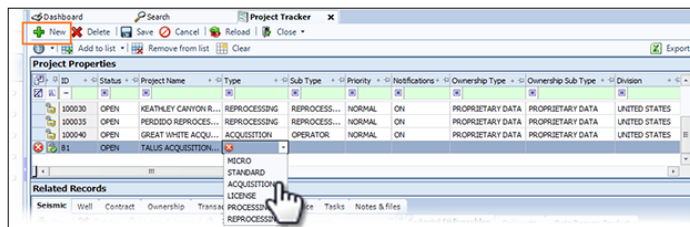
Status and Project name are required fields

4. Enter the remaining information for each field as applicable.
5. Click **Save**.

Creating a project begins when you receive a contract and have the initial details. Using the details you receive with the contract, you can create a project and enter the logistics in the **Project Properties** grid. After entering the project properties, you can add preliminary information in the **Related Records** area, and edit as the project progresses.

To create a new project and enter the project properties:

1. Open **Project Tracker** and click **New**. A new row adds to the **Project Properties** grid with an auto-generated ID.
2. Select a **Status** for the project and enter a **Project Name**.
3. Select the project **Type**.



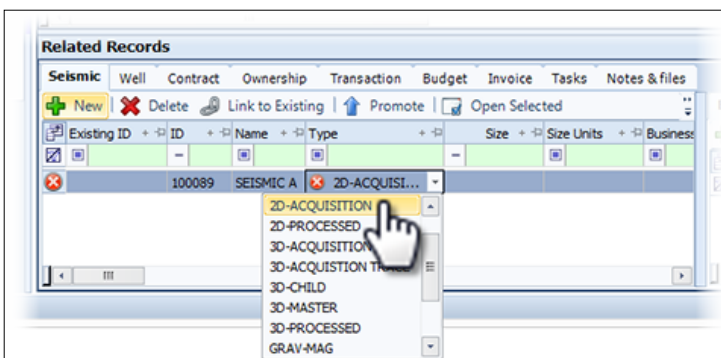
4. Enter the remaining information for each column as applicable.
5. Click **Save**.

Continue by adding the relevant **Related Records** information.

3.5 Add seismic to a project

Project Tracker accommodates workflows for adding new seismic or adding existing seismic to a project.

To add new seismic record through Project Tracker:



1. In the **Related Records** panel, click **New**.

A new row adds to the grid with an auto-generated ID. The new ID is a project-specific ID for the seismic.

2. Enter a **Name**.
3. Enter the remaining information for each column as applicable.
4. Click **Save**.

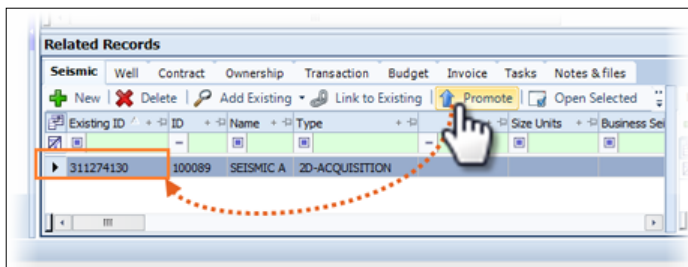
Clicking **Save**, saves the detail to the **Seismic** tab of the **Related Records**.

At this point, the detail is on hold until you promote the seismic to the database or link the seismic to an existing record.

To promote new seismic to production:

The **Promote** action generates a **Seismic ID** and makes the record available in the **Seismic** module.

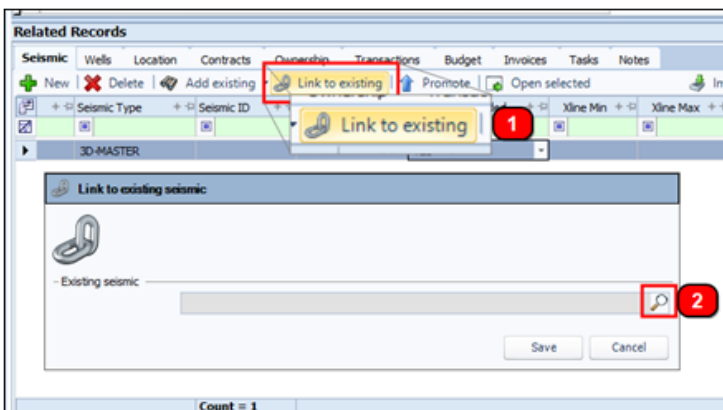
1. Select the seismic and click **Promote**.



2. In the confirmation window, click **Yes**. A seismic ID auto-generates for the new seismic.

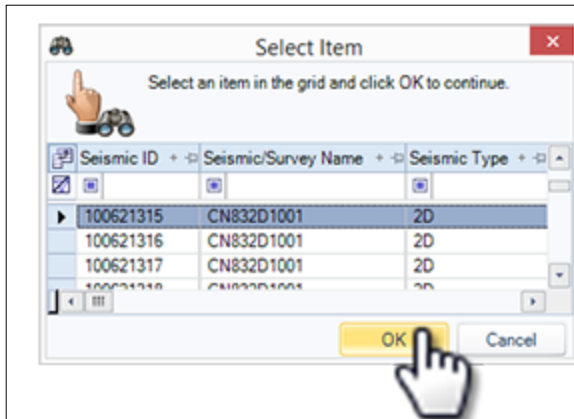
To link new seismic to existing:

After creating a seismic record in Project Tracker, you can link the record to seismic that already exists in Exploration Archives.



1. Select the seismic and click **Link to Existing**. The **Link to Seismic** window opens.
2. To find the existing seismic, click **search** and select a search option.

3. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
4. Select the linking seismic and click **OK**.



The **Select Item** window closes and the selected seismic ID displays in the **Link to Seismic** window.

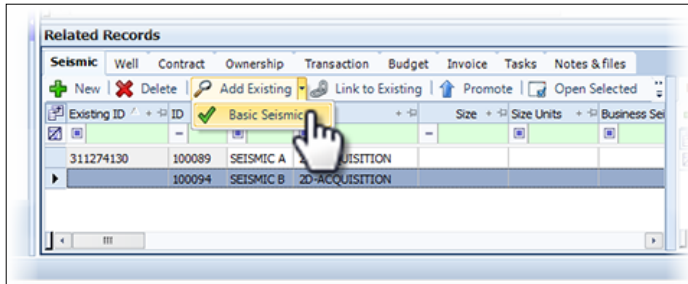
5. Click **Save**. The seismic ID displays in the **Seismic ID** column of the **Seismic** tab and the seismic record is linked to the existing seismic.

3.6 Add existing seismic to a project

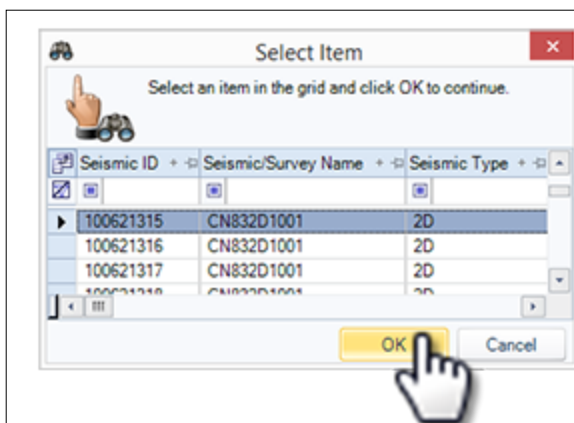
Project Tracker accommodates workflows for adding new seismic or adding existing seismic to a project. The **Add Existing** option provides search functionality to locate the existing seismic.

To add existing seismic to a project:

1. In the **Related Records** section, click the down-arrow of **Add Existing** and select a search.



2. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
3. Select the seismic to add to the project and click **OK**.



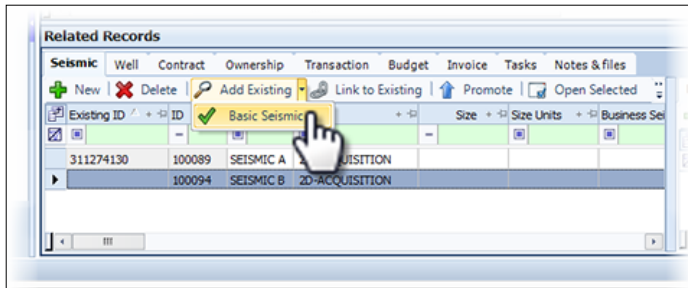
The **Select Item** window closes and the selected seismic adds to the **Seismic** tab of the **Related Records**.

4. Click **Save**.

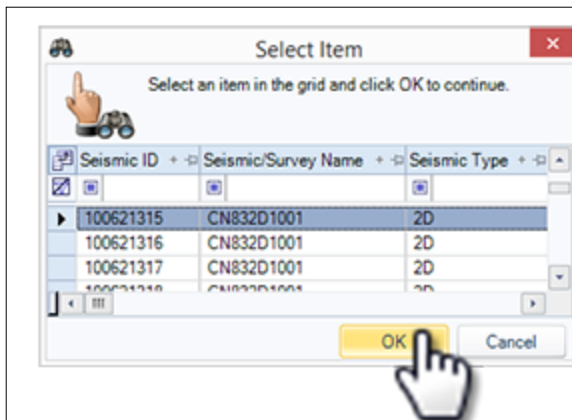
Project Tracker accommodates workflows for adding new seismic or adding existing seismic to a project. The **Add Existing** option provides search functionality to locate the existing seismic.

To add existing seismic to a project:

1. In the **Related Records** section, click the down-arrow of **Add Existing** and select a search.



2. When the search window opens, enter your search criteria and click **Search**. The results open in the **Select Item** window.
3. Select the seismic to add to the project and click **OK**.



The **Select Item** window closes and the selected seismic adds to the **Seismic** tab of the **Related Records**.

4. Click **Save**.

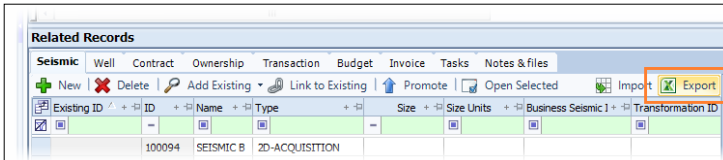
3.7 Importing seismic detail using Excel®

To add multiple seismic records to a project, import the records using Excel.

Importing with Excel requires specific formatting for the detail to import correctly to Exploration Archives.

You can create the template directly from the Project Tracker module.

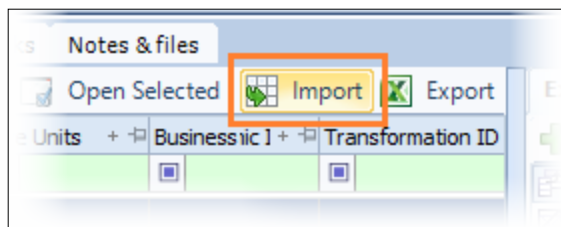
To create a template for importing, open the **Seismic** tab of **Related Records** and click **Export**.



Save the file and add the seismic information to be imported.

To import seismic using an Excel spreadsheet:

1. Open the **Seismic** tab of **Related Records** and click **Import**.



2. Navigate to the Excel file and select.
3. Click **Open**. The seismic records add to the grid in the **Seismic** tab.
4. Click **Save**.

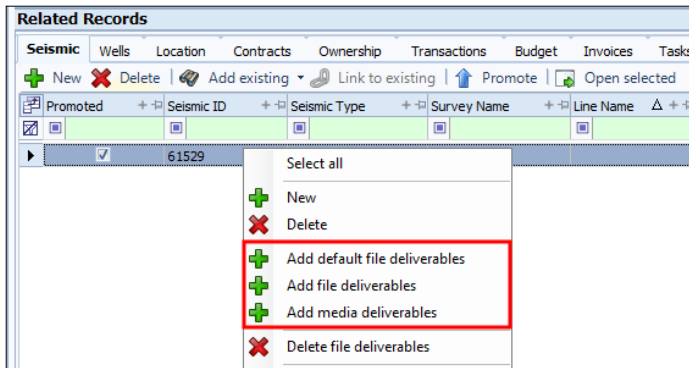
3.8 Add Deliverables

Once you have a Seismic attached to a project, you can attach deliverables.

To attach deliverables use one of the following methods:

Use the Context Menu

1. In the Related Records panel select the seismic record in the Seismic tab.
2. Right-click and select one of the deliverables options:



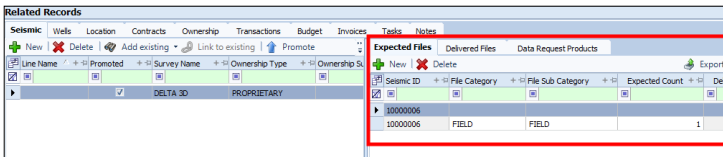
- » **Add default file deliverables** : This option adds the deliverables that have been configured to be automatically added to the expected files tab.
- » **Add file deliverables**: Select this option to open the Add deliverables dialogue.

- » Click **Save**.
- » Select the **File Category** and **File Sub Category**. Also enter the **Expected Count**.
- » **Add media deliverables**: Select this command and the Add deliverables dialogue opens.

Select the Type from the drop-down list and enter the Expected Count.

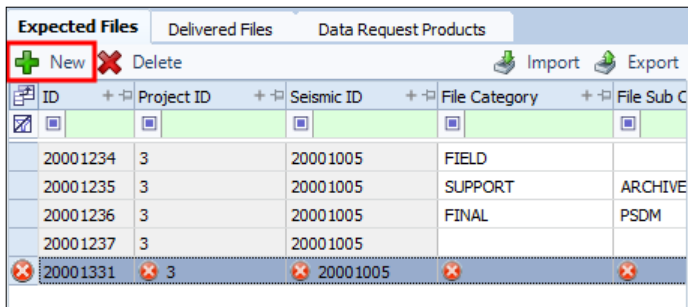
- » Click **Save**.

As deliverables are configured and saved you will notice that the deliverables will appear in the **Expected Files** tab that appears when a seismic is selected.



Attach a Deliverable on the Grid

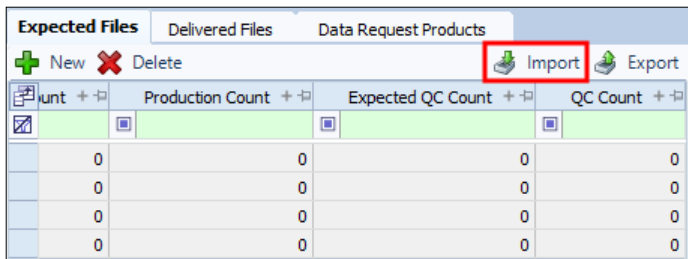
1. Select a Seismic record in the Related Records panel.
2. In the Expected Files tab, click **New**.



3. In the empty row that appears, enter each column from the drop-down lists or enter a value by double-clicking and typing in the cell.
4. When complete, click **Save** on the toolbar.

Import Expected Files from an Excel File

1. In the Expected Files tab, click **Import**.



2. In the File Explorer, navigate to the Excel file and select it.



Note:

The Excel file must have valid column names, such as database column name, property name, and caption. The Import will also look for the "File Category" and "File Sub Category"

3. Click **Open**.

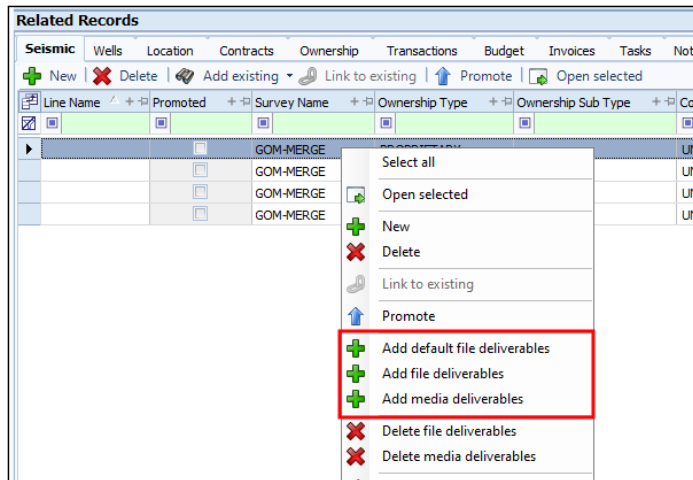
Before the import is complete, the following validation will happen:

- » When importing files, the category and sub-category must exist in the database. The sub-category must also be valid for the specified category.
 - » When importing media, the media type must exist in the database.
4. When the import complete, click **Save** on the toolbar.

Once you have a Seismic attached to a project, you can attach deliverables.

To attach deliverables:

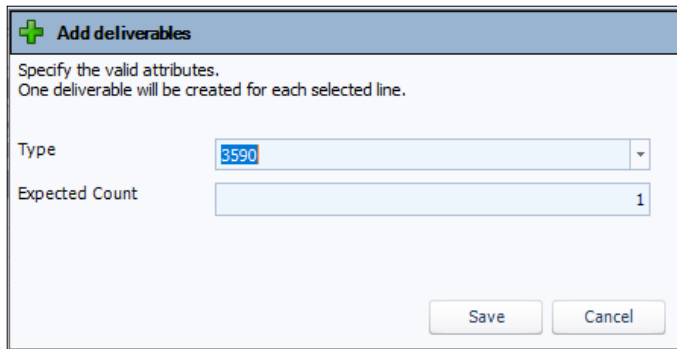
1. In the Related Records panel select the seismic record in the Seismic tab.
2. Right-click and select one of the deliverables options:



- » **Add default file deliverables** : This option adds the deliverables that have been configured to be automatically added to the expected files tab.
- » **Add file deliverables**: Select this option to open the Add deliverables dialogue.

The 'Add deliverables' dialog box is shown. It has a title bar with a green plus icon and the text 'Add deliverables'. Below the title bar, it says 'Specify the valid attributes. One deliverable will be created for each selected line.' There are three input fields: 'File Category' with a dropdown menu showing 'FIELD', 'File Sub Category' with a dropdown menu showing 'FIELD', and 'Expected Count' with a text box containing '1'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- » Select the **File Category** and **File Sub Category**. Also enter the **Expected Count**.
- » **Add media deliverables**: Select this command and the Add deliverables dialogue opens.



+ Add deliverables

Specify the valid attributes.
One deliverable will be created for each selected line.

Type: 3590

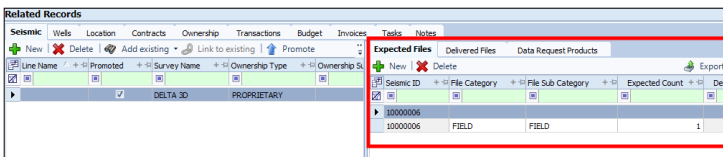
Expected Count: 1

Save Cancel

Select the Type from the drop-down list and enter the Expected Count.

» Click **Save**.

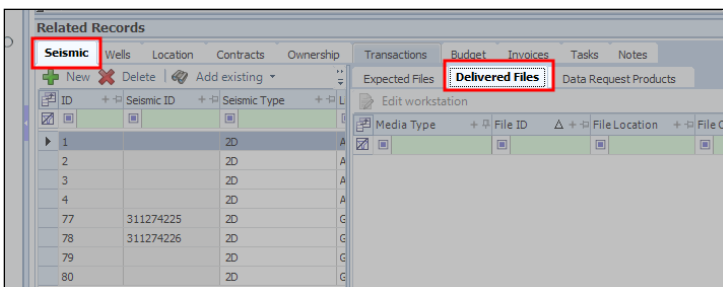
As deliverables are configured and saved you will notice that the deliverables will appear in the **Expected Files** tab that appears when a seismic is selected.



Seismic ID	File Category	File Sub Category	Expected Count	Del
100000006	FIELD	FIELD	1	

Delivered Files Tab

The Delivered Files tab is located in the secondary panel when the Seismic tab is selected in the related tab.



ID	Seismic ID	Seismic Type	Media Type	File ID	File Location	File Co
1		2D	A			
2		2D	A			
3		2D	A			
4		2D	A			
77	311274225	2D	G			
78	311274226	2D	G			
79		2D	G			
80		2D	G			

The Delivered Files tab will list files in a linked catalog session. When the catalog session is set to Uploaded, users can edit the details in **Edit Workstation**

For more information about Catalog Sessions refer to "Catalog" on page 70

**Note:**

In order for the files to be counted, the Seismic ID must match, also the File Category and File Sub Category from the Project module

The Delivered Files tab is located in the secondary panel when the Seismic tab is selected in the related tab.

Expected Files						
Delivered Files						
Data Request Products						
Edit workstation						
Media Type	File ID	File Location	File Category	File Sub Category	Title	Description
DVD ROM	OMV.162474177		SUPPORT	VSP SUPPORT	39	
DVD ROM	OMV.162474177		SUPPORT	VSP SUPPORT	39	
DVD ROM	OMV.162474177		SUPPORT	VSP SUPPORT	39	
DVD ROM	OMV.162474178		SUPPORT	VSP SUPPORT	39	
DVD ROM	OMV.162474178		SUPPORT	VSP SUPPORT	39	
DVD ROM	OMV.162474178		SUPPORT	VSP SUPPORT	39	

The Delivered Files tab will list files in a linked catalog session. When the catalog session is set to Uploaded, users can edit the details in **Edit Workstation**

For more information about Catalog Sessions refer to "Catalog" on page 70

**Note:**

In order for the files to be counted, the Seismic ID must match, also the File Category and File Sub Category from the Project module

Data Request Products

The **Data Request Products** tab is attached to the Seismic tab in the related records panel.

Related Records						
Seismic						
Wells Location Contracts Ownership Transactions Budget Invoices Tasks Notes						
Expected Files Delivered Files Data Request Products						
Open selected						
Request ID	Request Type	Request Sub Type	Request Status			
1	2D	A				
2	2D	A				
3	2D	A				
4	2D	A				
77	311274225	2D	G			
78	311274226	2D	G			
79	2D	G				
80	2D	G				

This tab lists the products attached to the seismic from a Data Request. See: "Data Request" on page 177.

The Data Request Products tab is attached to the Seismic tab in the related records panel.

This tab lists the products attached to the seismic from a Data Request. See: "Data Request" on page 177.

3.9 Add a contract

Depending on your company workflow, contract files can be added from the **Project Tracker** module or from the **Contract** module.

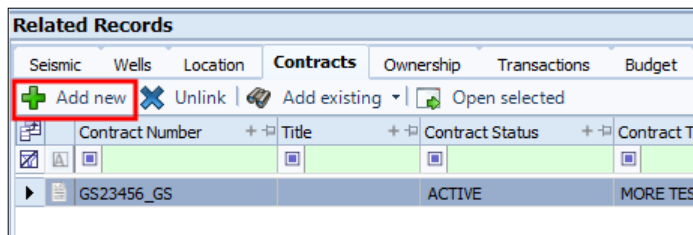
**Note:**

Before adding the contract, you must have at least one seismic record ready to link to the contract.

To add a new contract in Project Tracker use one of the following 2 methods:

Create a New Contract:

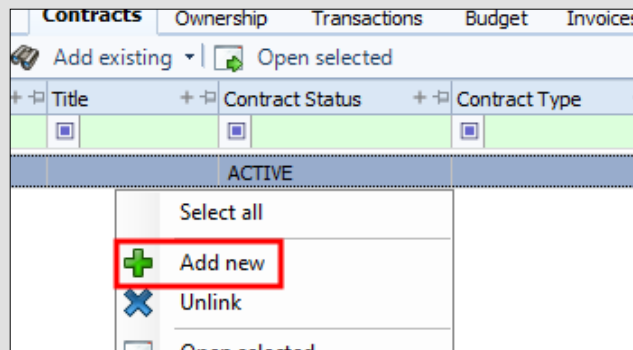
1. In the Related Records panel, select the Contracts tab.
2. Click **Add New**.



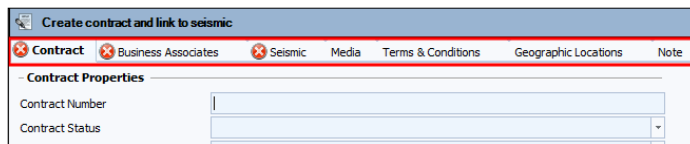


Tip:

Alternatively, you can right-click anywhere in the Contract grid to open the context menu then click **Add New**.



3. The **Create contract and link to seismic** window opens with several tabs available for entering associated information.

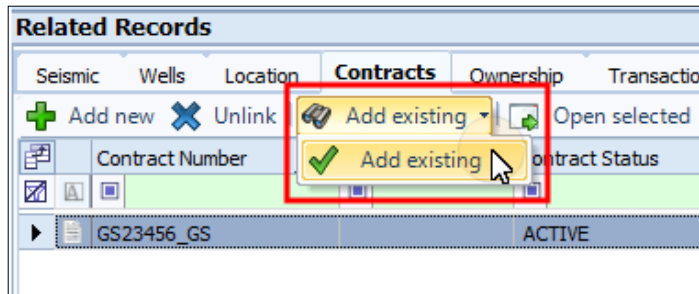


Each tab has a specific function

- » **Contract:** you enter the Information about the contract. Mandatory fields are Highlighted with an X. The Contract tab is required to be filled out before you save.
- » **Business Associates:** See: Assign or add a business associate
- » **Seismic:** See: Linking seismic to a new contract
- » **Media:** See: Adding the contract media
- » **Terms and Conditions:** This tab allows you to attach Terms and Conditions to the contract. See: Add Terms and Conditions
- » **Geographic Locations:** You can add different Geographic Locations . See: Add Geographic Locations
- » **Note:** See: Adding a note with a contract

Add an Existing Contract

1. In the Related Records panel, select the Contracts tab.
2. Click **Add Existing** from the drop-down.



3. In the Search Database Records window, enter your search criteria, then click **Search**.
4. From the search results, click on the contract or contracts to add, then click **OK**.



4.0 Catalog

The **Catalog** module is for adding products and linking to a seismic record in Exploration Archives.

New in this version:

- » Enhancements to **Smart Parse** to aid with Machine Learning (ML).
- » Added a Catalog Status Lock for multiple users
- » Added **Export to Shape File**
- » Updated the logic for Catalog duplicate check.

New in this version:

- » Improved File and Media grid filters to allow multi-select of sub-filtered Seismic list.
- » Improved the “Create import template” tool such that the resulting Excel file now includes pick-lists.
- » Updated “Smart Parse” and added “Link to Survey Name” option.
- » Added a tool to assist with replacing of a file that requires re-delivery (also available in the File module).

New in this version:

- » Added an **Open Selected** menu option to the file grid to allow opening of selected files in production.
- » Added a rule to the catalog workflow to prevent upload of items on an open data request.
- » Added a tool to allow the removing of production media.
- » Updated the import tool to allow the import of Parent-Child file links.
- » Updated the **View Original Seismic** tool so that the **Seismic Search** grid is now auto selected.

Use the **Catalog** module to:

- » Add files and media
- » Add associated information
- » Create bi-directional links between files, media and seismic
- » Enter the metadata and potentially move the files to various media.

**Note:**

The Catalog module is configured to fit your company's specific cataloging workflows.

The **Catalog** module is setup to accommodate two catalog types:

- » **New Item Catalog** is for new data
- » **Remediation Catalog** is for data remediation

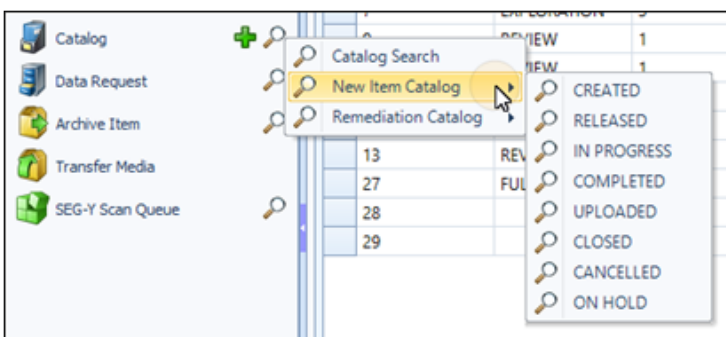
The overall features and functionality in the **Catalog** module are the same for both Catalog types. However, each type has unique statuses according to your company's workflows.

To create a new catalog session, refer to "Create a new catalog session" on page 92.

To open an existing catalog session, perform a catalog search from the **Workflows** section of the navigation panel.

To search the full repository of catalog records, click **search** and select **Catalog Search**. The **Search Catalog Records** window opens. Enter search criteria and click **Search**. The search results open in the view mode of the **Catalog** module.

Click **search** next to **Catalog** and point to either **New Item Catalog** or **Remediation Catalog**. Select the status of the catalog record and the results open in the view mode of the **Catalog** module. To learn about the view mode, see "Catalog view" on page 73.



The statuses, required fields and user roles are configured according to the different steps of each workflow. If you split your workflow into statuses, it will provide the framework for tagging required fields and setting custom user permissions.

The catalog session progresses through the statuses as defined for your company.

Typical statuses for a **New Item Catalog** session include:

1. **Created:** New catalog session is ready for entering information and adding files and media.
2. **Released:** Information has been added and items are ready for cataloging.
3. **In-progress:** Catalog session has been accepted and activities are in progress.
4. **Completed:** Catalog session is ready for quality control review.
5. **Uploaded:** Files are ready to be moved to media and synchronized.
6. **Closed:** Files have been synchronized and moved to production.
7. **Cancelled:** Catalog Session has been cancelled.
8. **On Hold:** Catalog Session has been placed on hold.

4.1 Catalog view

Performing a catalog search from the navigation panel opens a list of catalog sessions in **view mode**.

The view mode of the **Catalog** module includes the following:

ID	Catalog Name	Catalog Type	Catalog Status	Project ID	Staging Folder	Assigned Associate	Assigned User
316450...	IMPORT FROM EXC...	New Item Catalog	IN PROGRESS			TALLUS	TTI_DATA_2
100000...	DELTA	New Item Catalog	UPLOADED			TALLUS	DM
100000...	INITIAL CATALOG ...	New Item Catalog	CLOSED			TALLUS	Paul Thompson
100000...	2D SEGY SCAN	New Item Catalog	UPLOADED			TALLUS	Paul Thompson
100000...	MISSISSIPPI REME...	New Item Catalog	CLOSED			TALLUS	Paul Thompson
100000...	1000000180	Remediation Cat...	CREATED			OVATIONDATA (HOU)	
100000...	REMEDICATION DEMO	New Item Catalog	CLOSED			TALLUS	Paul Thompson
100000...	SEGY-X SCANNING	New Item Catalog	CREATED			OVATIONDATA (HOU)	Paul Thompson

Linked	Scan Status	File ID	File Category	Description	File Size (KB)	Content Created By	Original File Name
✓	Scanned	TTI.1000001635	PROCESSED	[SEGY SCANNED]	650	lneA.sgy	
✓	Scanned	TTI.1000001636	PROCESSED	[SEGY SCANNED]	1,620	lneA.sgy	

1. **Catalog Properties:** This grid displays the full list of catalog sessions that match your search criteria.
2. **Lock Icon:** Indicates when someone is editing the record. The lock displays as open when a record is not being edited. A green check displays to indicate that you are editing.

ID	Catalog Name	Catalog Type
100000...	INITIAL CATALOG ...	New
100000...	2D SEGY SCAN	New
100000...	REMEDICATION DEMO	New
100000...	REMEDICATION TAPES	New
100000...	SCAN DIRECTORY ...	New



Note:

Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

3. **Related Records:** This window displays information associated with the selected item in Catalog Properties. The information displays in various tabs.

**Note:**

In the Files tab, you'll notice that each linked file may have a highlight. A green highlight indicates that the required links have been met. A yellow highlight indicates you're missing a link to satisfy the required checks for files before you can push the items in production. A record without a highlight hasn't been linked yet.

You can open a file from this tab by either:

- » Double-clicking the file on the grid
- » Highlighting a file on the grid then click **Open selected**.

To learn about edit mode, refer to "Edit mode" on page 79.

Performing a catalog search from the navigation panel opens the list of catalog sessions in a view mode.

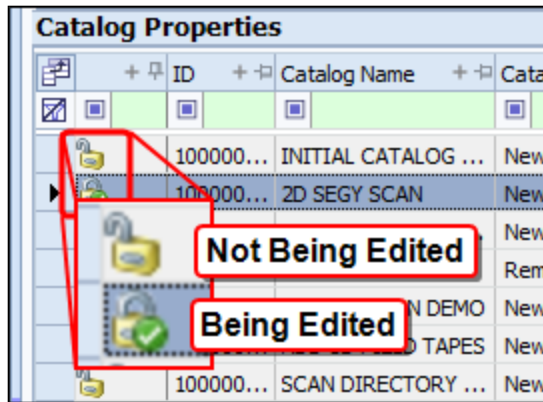
The view mode of the **Catalog** module includes the following:

The screenshot shows the 'Catalog' module interface. At the top, there's a 'Catalog Properties' tab (labeled 1) and a 'Related Records' tab (labeled 3). The 'Catalog Properties' tab contains a table with columns: ID, Catalog Name, Catalog Type, Catalog Status, Project ID, Cost Group, Initial Estimated Cost, and Rol. The 'Related Records' tab contains a table with columns: Linked, Scan Status, File ID, File Category, Description, File Size (KB), Original File Name, and Processed By. A red box labeled 2 highlights the 'Lock Icon' in the 'Catalog Properties' table.

ID	Catalog Name	Catalog Type	Catalog Status	Project ID	Cost Group	Initial Estimated Cost	Rol
100000...	INITIAL CATALOG ...	New Item Catalog	CLOSED				
100000...	2D SEG Y SCAN	New Item Catalog	UPLOADED				
100000...	MISSISSIPPI REME...	New Item Catalog	CLOSED				
100000...	1000000180	Remediation Cat...	CREATED		L48-OTHER		
100000...	REMEDICATION DEMO	New Item Catalog	CLOSED				
100000...	ADD 3D FIELD TAPES	New Item Catalog	UPLOADED				
100000...	SCAN DIRECTORY ...	New Item Catalog	CREATED				
100000...	PROJECT TRACKE...	New Item Catalog	UPLOADED	100044			

Linked	Scan Status	File ID	File Category	Description	File Size (KB)	Original File Name	Processed By
✓	Scanned	TTT.1000001635	PROCESSED	[SEGY SCANNED]	650	lineB.sgy	
✓	Scanned	TTT.1000001636	PROCESSED	[SEGY SCANNED]	1,620	lineA.sgy	

1. **Catalog Properties:** This grid displays the full list of catalog sessions that match your search criteria.
2. **Lock Icon:** Indicates when someone is editing the record. The lock displays as open when a record is not being edited. A green check displays to indicate that you are editing.

**Note:**

Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

3. **Related Records:** This window displays information associated with the selected item in Catalog Properties. The information displays in various tabs.

**Note:**

In the Files tab, you'll notice that each linked file may have a highlight. A green highlight indicates that the required links have been met. A yellow highlight indicates you're missing a link to satisfy the required checks for files before you can push the items in production. A record without a highlight hasn't been linked yet.

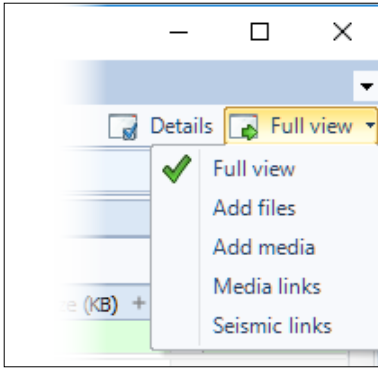
To learn about edit mode, refer to "Edit mode" on page 79.

Adjust workspace layout

The Catalog workspace in **edit mode** has functionality to edit the workspace layout.

Options include preset and custom layouts. You also have the ability to undock and float different panes.

Preset layouts



Preset layouts are available for targeted tasks in your cataloging workflow. To set the view to a preset layout, click and select an option from the upper right corner.

Preset layout options include:

- » Full view
- » Add files
- » Add media
- » Media links
- » Seismic links

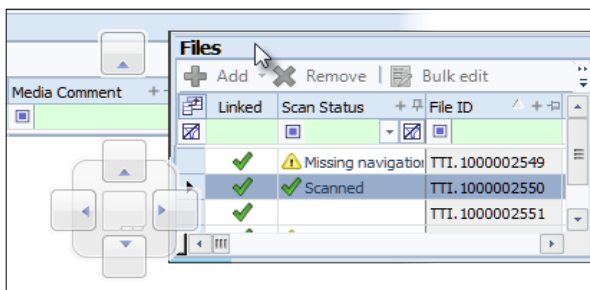
Custom layouts

The Catalog module offers flexibility to customize your workspace by undocking and repositioning panes.

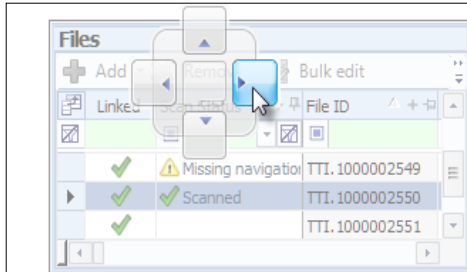
Undocking and docking to a new position

To dock a panel to a new dock position:

1. Click and hold the blue header of the panel.
2. Drag the panel out of its dock.
Drop zone arrows display to indicate the available docking positions.



3. Move the cursor to hover over the target drop zone. When the cursor is in position, the drop arrow turns blue.



4. Release the mouse button to place the panel in the new docked position.

Undock a panel as a new window

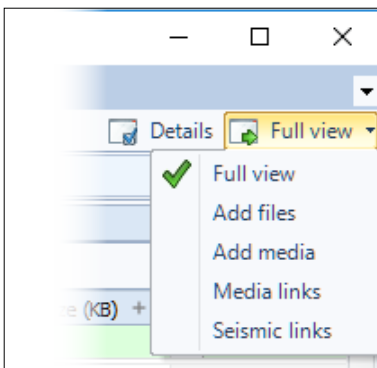
To undock a panel and use as a new window:

1. Click and hold the blue header of the panel.
2. Drag the panel out of its dock.
Drop zone arrows display to indicate the available docking positions.
3. Release the panel anywhere *except* over a drop zone. The panel becomes a new window for you to position anywhere on your screen or even to a second monitor.

The Catalog workspace in edit mode has functionality to edit the workspace layout.

Options include preset and custom layouts. You also have the ability to undock and float different panes.

Preset layouts



Preset layouts are available for targeted tasks in your cataloging workflow. To set the view to a preset layout, click and select an option from the upper right corner.

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- » Full view
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- » Media links
- » Seismic links

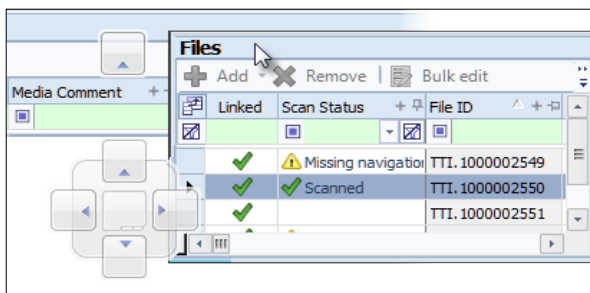
Custom layouts

The Catalog module offers flexibility to customize your workspace by undocking and repositioning panes.

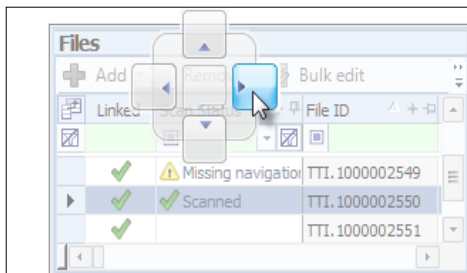
Undocking and docking to a new position

To dock a panel to a new dock position:

1. Click and hold the blue header of the panel.
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4. Release the mouse button to place the panel in the new docked position.

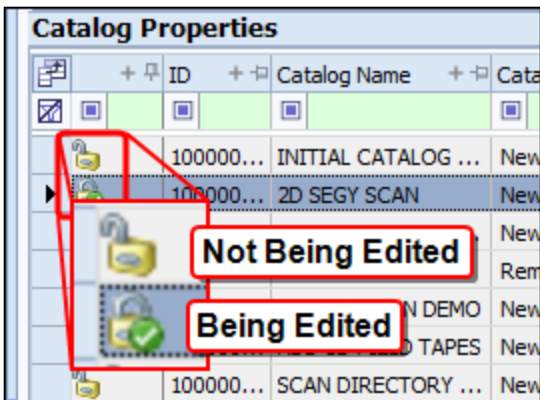
Undock a panel as a new window

To undock a panel and use as a new window:

1. Click and hold the blue header of the panel.
2. Drag the panel out of its dock.
Drop zone arrows display to indicate the available docking positions.
3. Release the panel anywhere *except* over a drop zone. The panel becomes a new window for you to position anywhere on your screen or even to a second monitor.

4.2 Edit mode

The sessions in the **Catalog Properties** grid display a soft-lock icon to indicate when a user is editing a record. If the lock displays as open, the record is not being edited by another user.

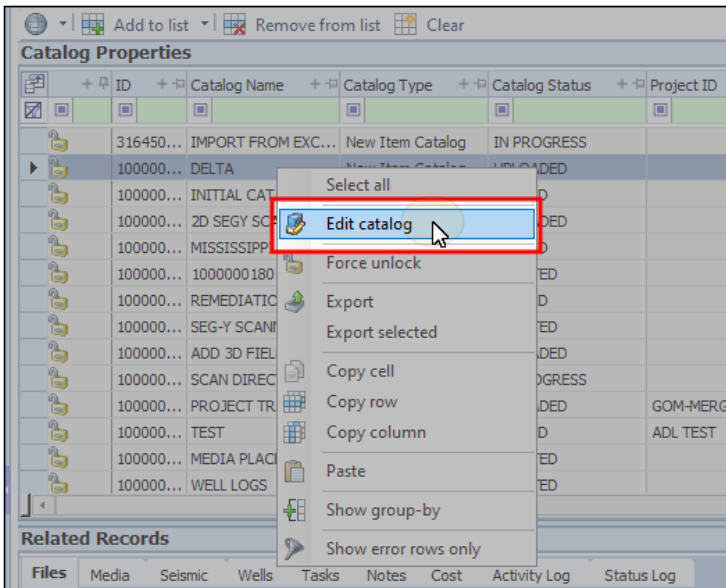


Note:

The lock icon is for indication purposes only and does not prevent others from editing.

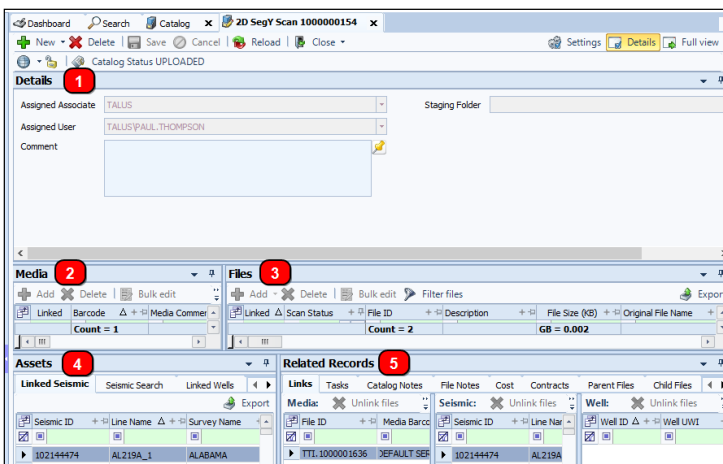
To edit a catalog record:

Double-click on the record or right-click and select **Edit catalog**.



The session opens in edit mode in the default edit view, or in the last view layout you had open. To modify the workspace layout, refer to "Adjust workspace layout" on page 75.

The default edit layout includes five panes:



1. **Details:** general information



Tip:

Click **Details** in the upper right corner to toggle on and off.

2. **Media:** working space for adding and linking media
3. **Files:** working space for adding and linking files
4. **Assets:** includes tabs for searching Seismic and Wells, and tabs to indicate linked seismic and wells.
5. **Related Records:** includes several tabs for viewing the various categories of information associated to the catalog session.

The Catalog module has a **view mode** and an **edit mode** for catalog records.

The edit mode of the Catalog module lets you add files and media, catalog detail, and link items to a seismic survey.

A catalog session progresses through various statuses specific to your company workflow.

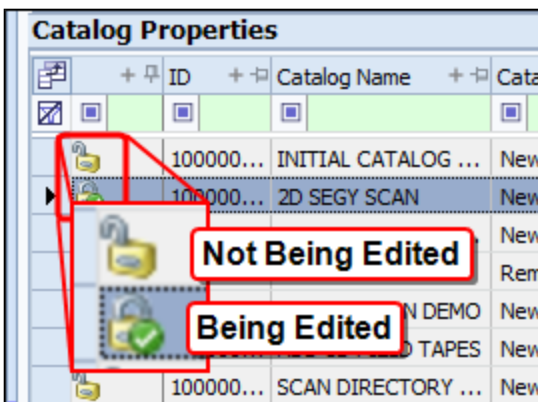


Note:

To change the status of a session, refer to Updating the status of a catalog session.

When [creating a new session](#), the catalog window will open in edit mode.

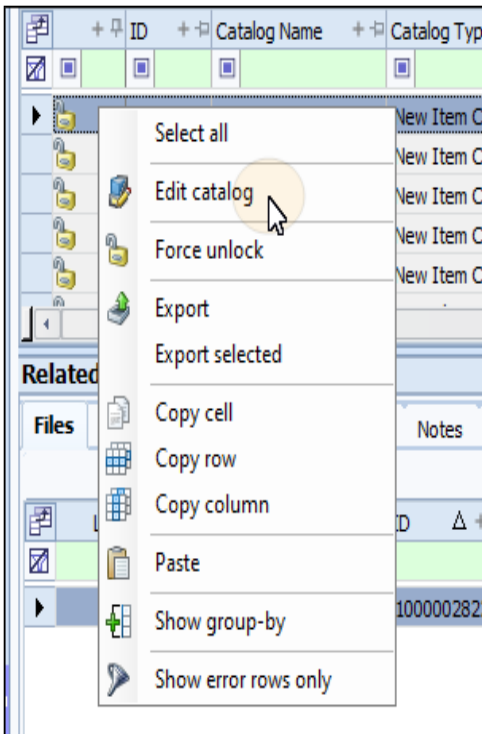
The sessions in the **Catalog Properties** grid display a soft-lock icon to indicate when a user is editing a record. If the lock displays as open, the record is not being edited by another user. The lock icon is for indication purposes only and does not prevent others from editing.



**Note:**

The lock icon is for indication purposes only and does not prevent others from editing.

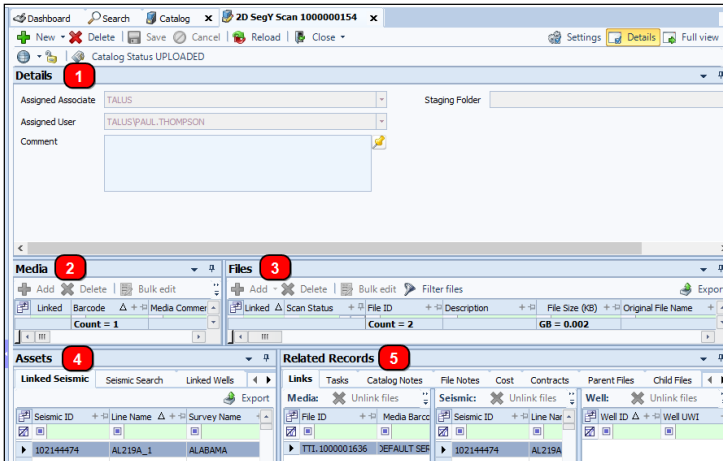
Double-click on the record or right-click and select **Edit catalog**.



The session opens in edit mode in the default edit view, or in the last view layout you had open. To modify the workspace layout, refer to "Adjust workspace layout" on page 75.

As soon as you begin editing the record, the **Catalog Properties** grid will display a green check to indicate that you are editing. Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

The default edit layout includes five panes:



1. **Details:** general information

**Tip:**

Click **Details** in the upper right corner to toggle on and off.

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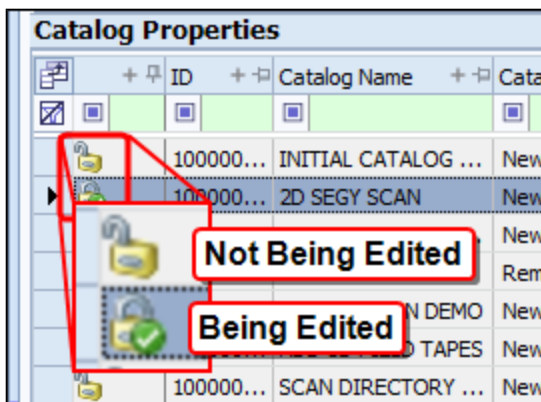
A catalog session progresses through various statuses specific to your company workflow.

**Note:**

To change the status of a session, refer to Updating the status of a catalog session.

When [creating a new session](#), the catalog window will open in edit mode.

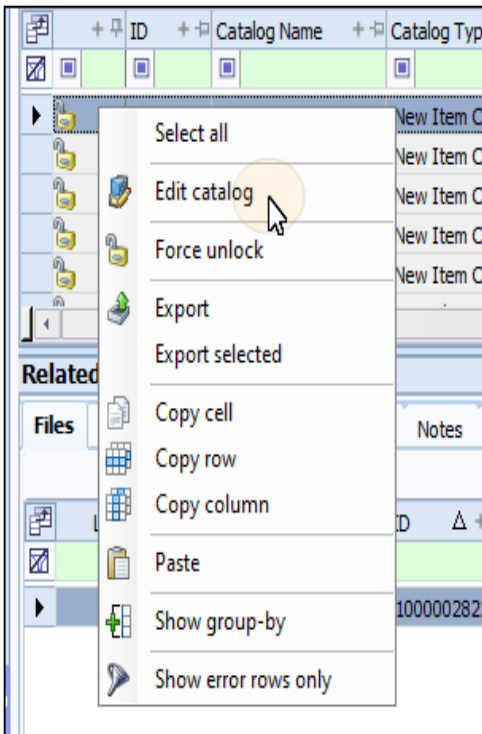
The sessions in the **Catalog Properties** grid display a soft-lock icon to indicate when a user is editing a record. If the lock displays as open, the record is not being edited by another user. The lock icon is for indication purposes only and does not prevent others from editing.



**Note:**

The lock icon is for indication purposes only and does not prevent others from editing.

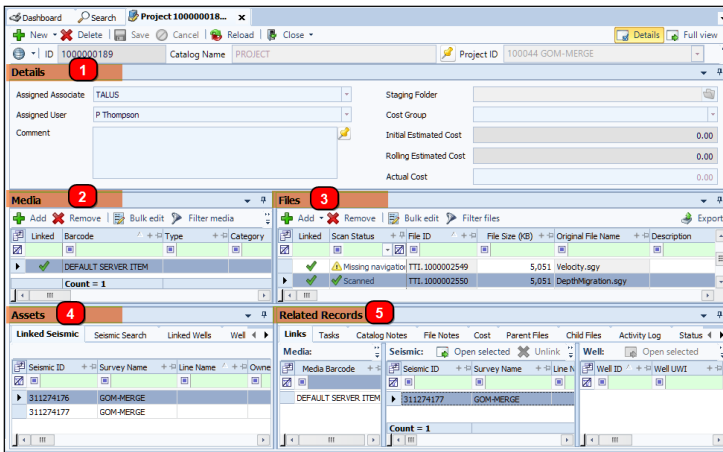
Double-click on the record or right-click and select **Edit catalog**.



The session opens in edit mode in the default edit view, or in the last view layout you had open. To modify the workspace layout, refer to "Adjust workspace layout" on page 75.

As soon as you begin editing the record, the **Catalog Properties** grid will display a green check to indicate that you are editing. Even with the lock-edit indicator, the record remains available for others to open and edit. The green lock remains for 48 hours, unless you close the record sooner or another user begins editing the record.

The default edit layout includes five panes:



1. **Details:** general information



Tip:

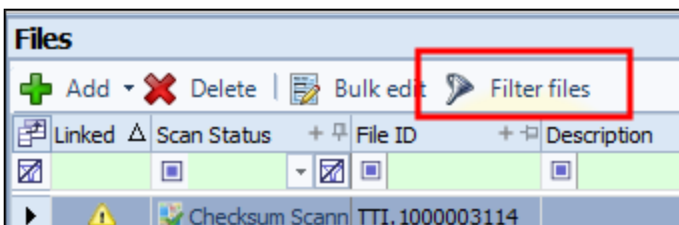
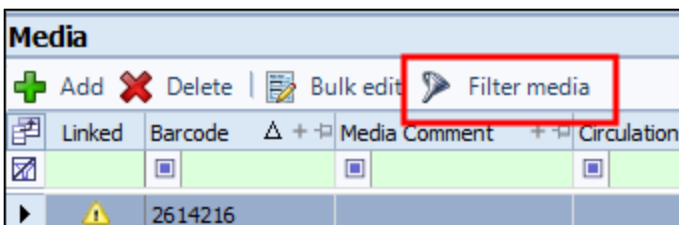
Click **Details** in the upper right corner to toggle on and off.

2. **Media:** working space for adding and linking media
3. **Files:** working space for adding and linking files
4. **Assets:** includes tabs for searching Seismic and Wells, and tabs to indicate linked seismic and wells.
5. **Related Records:** includes several tabs for viewing the various categories of information associated to the catalog session.

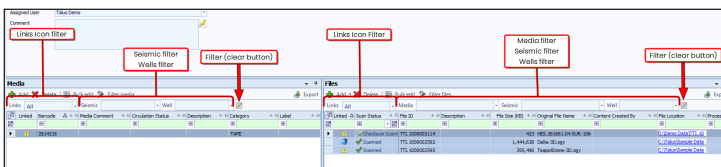
Media/File Filters

While in **edit mode**, the catalog editor has a filter toolbar on both the **catalog media** and **catalog file** views.

There is a button on each view to enable the filters on the respective toolbars.



When you select the **Filter media** button the toolbar expands to show the filters.



The filters have the following features:

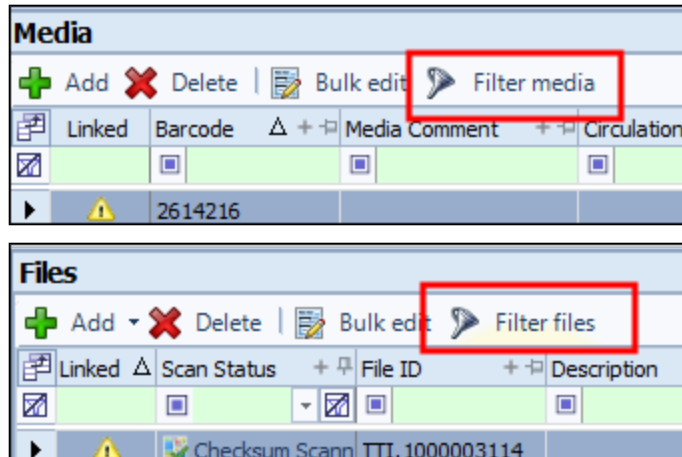
- » Multi-select has been added for each filter grid.
- » Row filters are enabled allowing for custom filters to be applied to the filter grid columns. (Note, this is only available with the filter icons, not the row filter feature that is available on all grids)

Exploration Archives 4.5 - Workflows

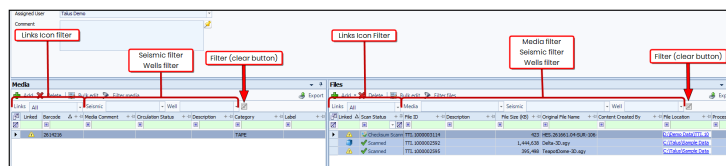
- » A checkbox has been added to each filter grid.
- » The checkbox has been pinned, allowing for the ability to scroll through all the columns and still have it be visible.
- » The clear button has been updated to clear all custom filters and selected checkboxes.
- » Multiple filters are now applied to each (media and file) view allowing more than one filter to be active at a time.

The catalog editor has a filter toolbar on both the **catalog media** and **catalog file** views.

On each view is a button to enable the filters on the respective toolbars.



When you select the **Filter media** button the toolbar expands to show the filters.



The filters have the following features:

- » Multi-select has been added for each filter grid.
- » Row filters are enabled allowing for custom filters to be applied to the filter grid columns. (Note, this is only available with the filter icons, not the row filter feature that is available on all grids)
- » A checkbox has been added to each filter grid.
 - » The checkbox has been pinned, allowing for the ability to scroll through all the columns and still have it be visible.
- » The clear button has been updated to clear all custom filters and selected checkboxes.
- » Multiple filters are now applied to each (media and file) view allowing more than one filter to be active at a time.



4.3 Create a new catalog session

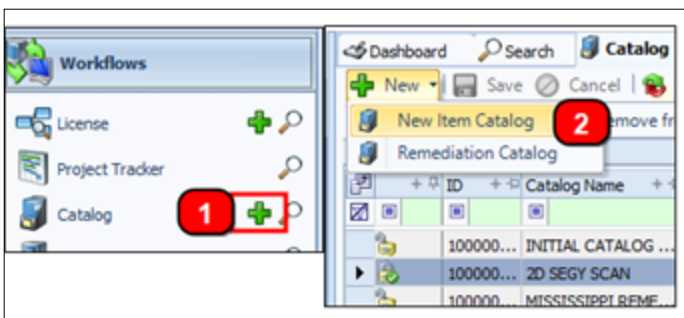
The **Catalog** module includes a variety of features and functions for cataloging your products and linking them to the associated records in Exploration Archives. The main tasks are to add files and media, enter metadata, catalog the detail and link the items to seismic.



Note:

These instructions are relevant to the **New Item Catalog** type of catalog session. However, the **Remediation Catalog** type has the same features and layout.

You can create a new catalog session 2 ways:



1. **On the Navigation panel:** Click **Add** beside the Catalog module
2. **From the toolbar:** Click **New**, then select **New Item Catalog** from the list.

The **Catalog** module opens in the edit mode.

The **information bar** includes the following fields:

The screenshot shows the top of the Catalog module interface. The 'Information Bar' contains the following fields: ID (10000000204), Catalog Name, Project ID, and Catalog Status (CREATED). Below this is a 'Details' panel with fields for Assigned Associate, Assigned User, Comment, Staging Folder, Cost Group, Initial Estimated Cost, Rolling Estimated Cost, and Actual Cost.

- » **ID:** The ID is auto-populated.
- » **Catalog Name:** This is a required field.
- » **Project ID:** If needed, select the **Project ID** from the drop-down list.
- » **Lock icon:** indicates if the session is locked.
- » **Catalog Status:** When creating a new session, this normally displays as CREATED.

In the **Details** panel, fill out the following fields:

The screenshot shows the 'Details' panel of the Catalog module. It contains the following fields: Assigned Associate, Assigned User, Comment, Staging Folder, Cost Group, Initial Estimated Cost, Rolling Estimated Cost, and Actual Cost.

- » **Assigned Associate** and **Assigned User:** Select these from their respective drop-down list.
- » **Comment:** You can enter the comment directly in the field, or click the pin to open the edit window and enter a comment.
- » **Staging Folder:** Click the browse icon and navigate to the location of the staging folder.
- » **Cost Group:** Select the Cost Group in accordance with your company procedures.
- » The last 3 fields: **Initial Estimated Cost**, **Rolling Estimated Cost**, and **Actual Cost**.

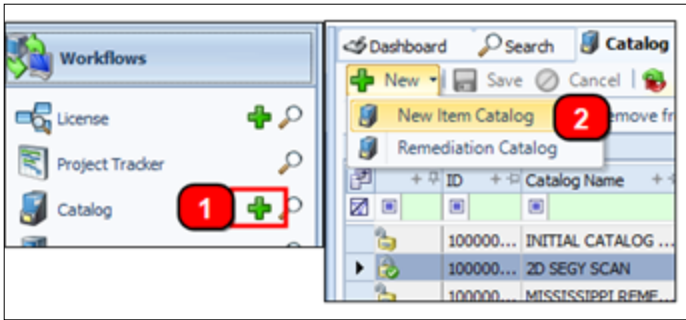
The **Catalog** module includes a variety of features and functions for cataloging your products and linking them to the associated records in Exploration Archives. The main tasks are to add files and media, enter metadata, catalog the detail and link the items to seismic.



Note:

These instructions are relevant to the **New Item Catalog** type of catalog session. However, the **Remediation Catalog** type has the same features and layout.

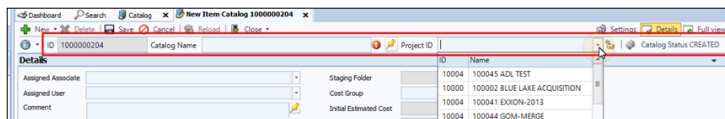
You can create a new catalog session 2 ways:



1. On the Navigation panel: Click **Add** beside the Catalog module
2. From the toolbar: Click **New**, then select **New Item Catalog** from the list.

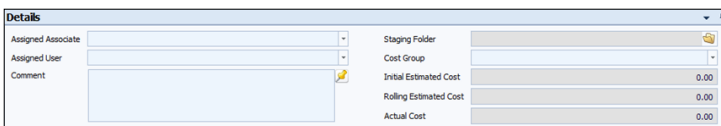
The **Catalog** module opens in the edit mode.

The **information bar** includes the following fields:



- » **ID**: The ID is auto-populated.
- » **Catalog Name**: This is a required field.
- » **Project ID**: If needed, select the **Project ID** from the drop-down list.
- » **Lock icon**: indicates if the session is locked.
- » **Catalog Status**: When creating a new session, this normally displays as CREATED.

In the **Details** panel, fill out the following fields:

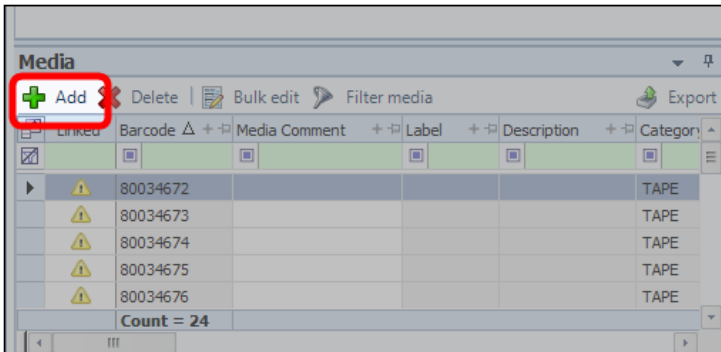


- » **Assigned Associate** and **Assigned User**: Select these from their respective drop-down list.
- » **Comment**: You can enter the comment directly in the field, or click the pin to open the edit window and enter a comment.
- » **Staging Folder**: Click the browse icon and navigate to the location of the staging folder.
- » **Cost Group**: Select the Cost Group in accordance with your company procedures.
- » The last 3 fields: **Initial Estimated Cost**, **Rolling Estimated Cost**, and **Actual Cost**.

4.4 Add media

To add media to a catalog session, open the session in [edit mode](#). The default layout for the edit mode includes all five workspace panes. To modify the workspace layout, refer to "Adjust workspace layout" on page 75.

To add media, click **Add** from the **Media** panel.



The **Create Catalog Media** window opens.

A screenshot of the 'Create Catalog Media' window. The window has a title bar with a green plus icon and the text 'Create Catalog Media'. It is divided into two main sections: 'Media Settings' and 'File Settings'.
Media Settings:
- Type: A dropdown menu.
- Category: A dropdown menu.
- Media Created By: A dropdown menu.
- Media Created Date: A dropdown menu.
- Original Number: A text input field.
- Current Store: A dropdown menu.
- Current Store Location: A text input field.
- Current Store Box Number: A text input field.
File Settings:
- Create Placeholder: A checkbox.
- File Category: A dropdown menu.
- Sub Category: A dropdown menu.
- Title: A text input field.
- Barcode: A text input field with an 'Add' button next to it.
At the bottom, there is a section for 'Add Existing Media' with a table that has columns 'Result', 'Barcode', and 'Message'. The table is currently empty. At the very bottom of the window are 'Save' and 'Cancel' buttons.

The **Create Catalog Media** Window lets you add many media sources creating a **batch**. The information you enter in the 2 sections of the window attach to the media.

Add media to the batch:

- » Using a barcode reader, scan the barcode to auto-populate the **Barcode** field.

**Tip:**

Alternatively, type in the field to enter the barcode.

Result	Barcode	Message
✓	TAPE-1011	Barcode 'TAPE-1011' is in production, linked with 1 file.
✗	TAPE-1001	Barcode 'TAPE-1001' exists on pre-uploaded catalog session.
⚠	DELTA-2015-3D...	Barcode 'DELTA-2015-3D-026' is in production, linked with 1 file
⚠	80034672	Barcode '80034672' is in production, linked with 18 files.

0 valid barcodes. Save Cancel

- » If the message column indicates that the media is in production, you can override the validation restriction by selecting **Add Existing Media**. For existing media, the media will add to the catalog session without updating the **Media Settings**.

Result	Barcode	Message
✓	TAPE-1011	
✓	TAPE-1001	Barcode 'TAPE-1001' exists on pre-uploaded catalog session.
✓	DELTA-2015-3D...	
✓	80034672	

5 valid barcodes. Save Cancel

Adding Media Details:

Metadata that could be common to the media included in the batch is split into two sections:

- » **Media Settings:** Use the fields in this section to enter information such as the Type, Category, and who the media was created by.

Create Catalog Media

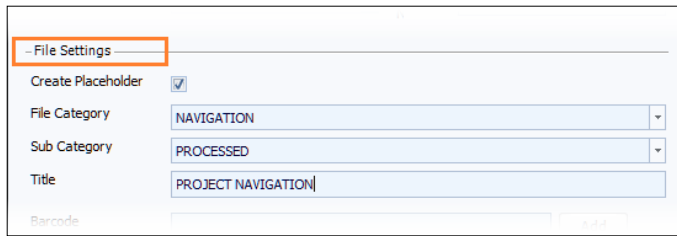
Media Settings

Type	3592	Original Number	P-4506
Category	TAPE	Current Store	OVATION - LONDON
Media Created By	PETROLEUM GEO-SERVICES	Store Location	
Media Created Date	21-Feb-2018	Current Store Box Number	

File Settings

- » **File Settings:** Used for creating a placeholder for a file which is useful for a large dataset such as field data or gathers.

Select **Create Placeholder** to open the file metadata fields and enter the associated detail.

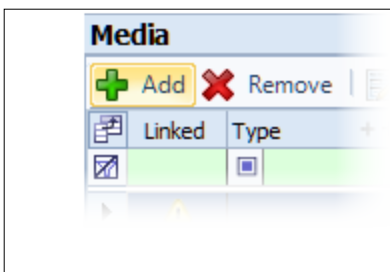


The screenshot shows a 'File Settings' dialog box. It has a title bar with '- File Settings'. Below the title bar, there are several fields: 'Create Placeholder' with a checked checkbox, 'File Category' with a dropdown menu showing 'NAVIGATION', 'Sub Category' with a dropdown menu showing 'PROCESSED', and 'Title' with a text field containing 'PROJECT NAVIGATION'. At the bottom, there is a 'Barcode' field and an 'Add' button.

» Click **Save** to add the valid barcodes, and the window closes.

To add media to a catalog session, open the session in [edit mode](#). The default layout for the edit mode includes all five workspace panes. To modify the workspace layout, refer to "Adjust workspace layout" on page 75.

To add media, click **Add** from the **Media** panel.



The **Create Catalog Media** window opens.

The Create Media Window lets you add many media sources creating a **batch**. The information you enter in the 2 sections of the window attach to the media.

Add media to the batch:

- » Using a barcode reader, scan the barcode to auto-populate the **Barcode** field.

**Tip:**

Alternatively, type in the field to enter the barcode.

Result	Barcode	Message
✓	TAPE-1011	Barcode 'TAPE-1011' is in production, linked with 1 file.
✗	TAPE-1001	Barcode 'TAPE-1001' exists on pre-uploaded catalog session.
✓	DELTA-2015-3D...	Barcode 'DELTA-2015-3D-026' is in production, linked with 1 file
✓	80034672	Barcode '80034672' is in production, linked with 18 files.

0 valid barcodes.

Save Cancel

- » If the message column indicates that the media is in production, you can override the validation restriction by selecting **Add Existing Media**. For existing media, the media will add to the catalog session without updating the **Media Settings**.

Result	Barcode	Message
✓	TAPE-1011	
✗	TAPE-1001	Barcode 'TAPE-1001' exists on pre-uploaded catalog session.
✓	DELTA-2015-3D...	
✓	80034672	

5 valid barcodes.

Save Cancel

Adding Media Details:

Metadata that could be common to the media included in the batch is split into two sections:

- » **Media Settings:** Use the fields in this section to enter information such as the Type, Category, and who the media was created by.

Create Catalog Media

Media Settings

Type	3592	Original Number	P-4506
Category	TAPE	Current Store	OVATION - LONDON
Media Created By	PETROLEUM GEO-SERVICES	Store Location	
Media Created Date	21-Feb-2018	Current Store Box Number	

File Settings

- » **File Settings:** Used for creating a placeholder for a file which is useful for a large dataset such as field data or gathers.

Select **Create Placeholder** to open the file metadata fields and enter the associated detail.

- File Settings

Create Placeholder ☒

File Category NAVIGATION

Sub Category PROCESSED

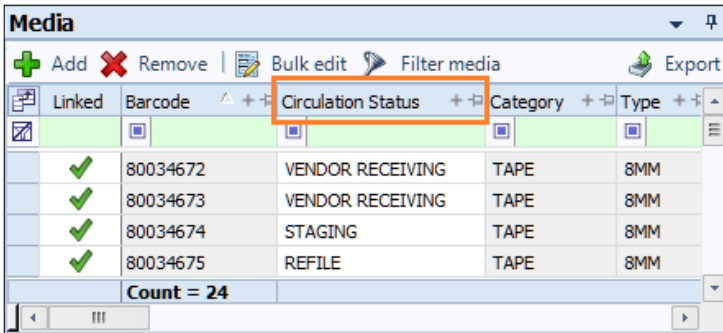
Title PROJECT NAVIGATION

Barcode Save

- » Click **Save** to add the valid barcodes, and the window closes.

View circulation status

To view the circulation status of a media item, locate the **Circulation Status** column in the main grid of the Media panel.



The screenshot shows the 'Media' panel with a toolbar at the top containing 'Add', 'Remove', 'Bulk edit', 'Filter media', and 'Export'. Below the toolbar is a grid with columns: 'Linked', 'Barcode', 'Circulation Status', 'Category', and 'Type'. The 'Circulation Status' column is highlighted with an orange box. The grid contains five rows of data, each with a green checkmark in the 'Linked' column, a barcode, a circulation status, a category, and a type. At the bottom of the grid, it says 'Count = 24'.

Linked	Barcode	Circulation Status	Category	Type
✓	80034672	VENDOR RECEIVING	TAPE	8MM
✓	80034673	VENDOR RECEIVING	TAPE	8MM
✓	80034674	STAGING	TAPE	8MM
✓	80034675	REFILE	TAPE	8MM

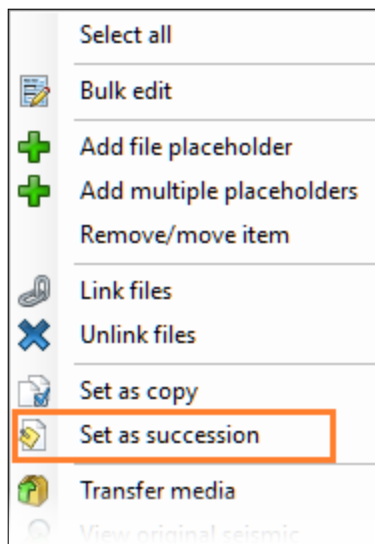
Count = 24

Set media as a succession

If a media item in your catalog session is the successor of another media, set the media as the succession by specifying the original media.

To set a media as a succession of another media item:

1. In the **Media** grid, select the item to be set as a succession.
2. Right-click on the item to open the context menu and select **Set as succession**.



The **Set as succession** window opens.



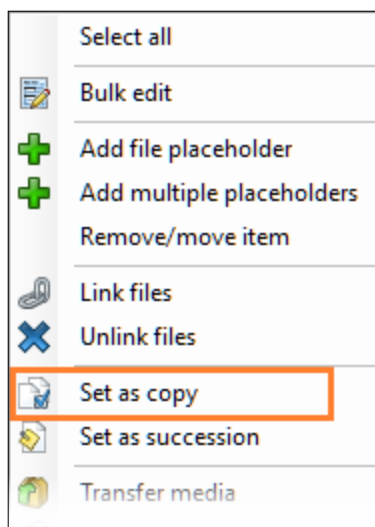
3. Search for the original media to assign and select. Click **Save**.

Set as a copy

If a media item in your catalog session is a copy of another media, set the media as a copy by specifying the original media.

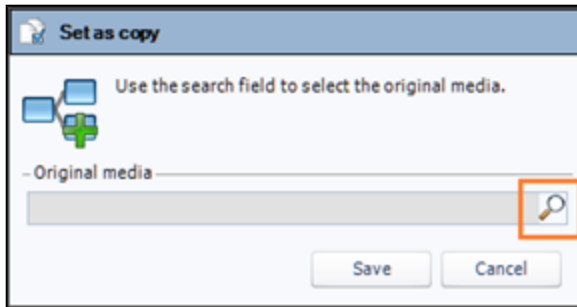
To set a media as a copy of another media item:

1. In the **Media** grid, select the item to be set as a copy.
2. Right-click on the item to open the context menu and select **Set as copy**.



The **Set as copy** window opens.

3. Search for the original media to assign and select. Click **Save**.

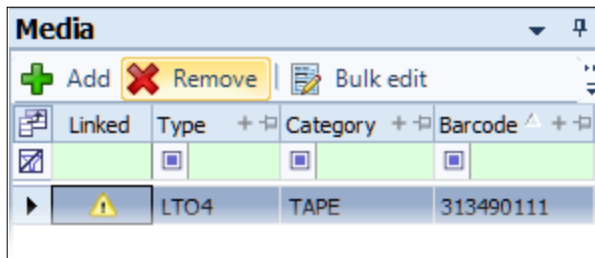


Move or remove media

Media that has been added to a session can be removed from the session or moved to another session.

To remove media:

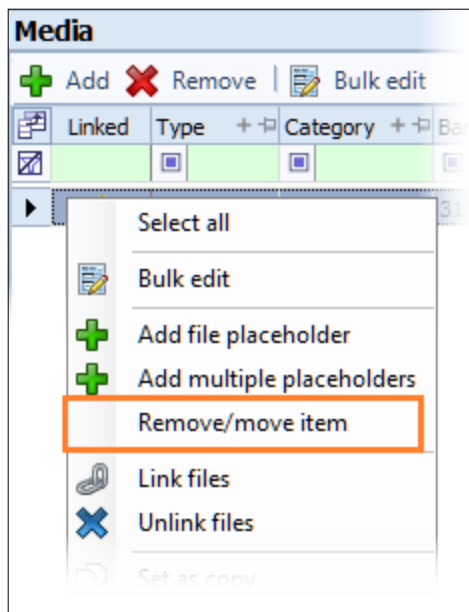
1. Select the media in the **Media** grid and click **Remove** from the toolbar.



2. A confirmation message opens. Click **Yes** to confirm.
3. The media record removes from the grid.

To move media to another session:

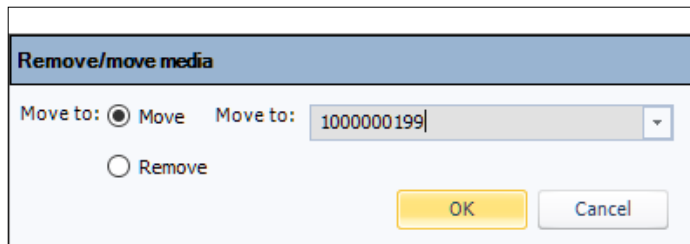
1. In the **Media** grid, select the item to move.
2. Right-click on the item to open the context menu and select **Remove/move item**.



The **Remove/move media** window opens.

3. In the **Move to** field, select the session to move the media to. Click **OK**.

The media removes from the current session and adds to the specified session.



A dialog box titled "Remove/move media" with a blue header bar. It contains two radio buttons: "Move" (selected) and "Remove". To the right of the "Move" radio button is a text field labeled "Move to:" containing the value "1000000199" and a dropdown arrow. At the bottom right are two buttons: "OK" (yellow) and "Cancel" (gray).

4.5 Add files

The **New Item Catalog** module has a couple of options for adding a file to Exploration Archives during the cataloging process:

- » Drag and drop
- » Add files or directory options from the grid menu

Files are any form of consumable seismic product and are available online, offline or nearline.

Depending on your company workflow, the files could originate in a staging directory on your desktop computer, or in another designated location.



Note:

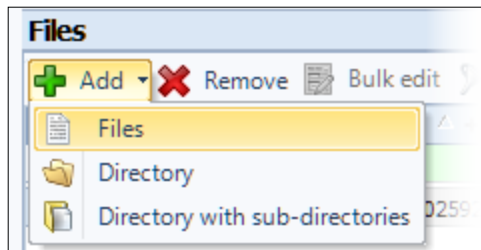
Adding a file to Exploration Archives auto-generates a **File ID** in the **Files** grid. At the same time, the original file in the originating directory will be renamed with the **File ID** appended as a prefix to the name.

Adding files with drag and drop

1. Navigate to the location of your file.
2. Click then drag and drop the file to the **Files** grid.
The file automatically loads to the grid with an auto-generated **File ID**
3. Select, or enter, the details for the relevant columns.
4. Click **Save**.

Adding files using the Add button

1. In the **Files** panel, click **Add** and select the item type to add:



- » Files
 - » Directory
 - » Directory with sub-directories
2. Navigate to the item you are adding. Select and click **Open** or **Select Folder**. The item adds to the grid and auto-populates the **File ID**, **File Size** and **Original File Name** and **Trimmed Location**.
 3. Select, or enter, the details for the relevant columns.
 4. Click **Save**.

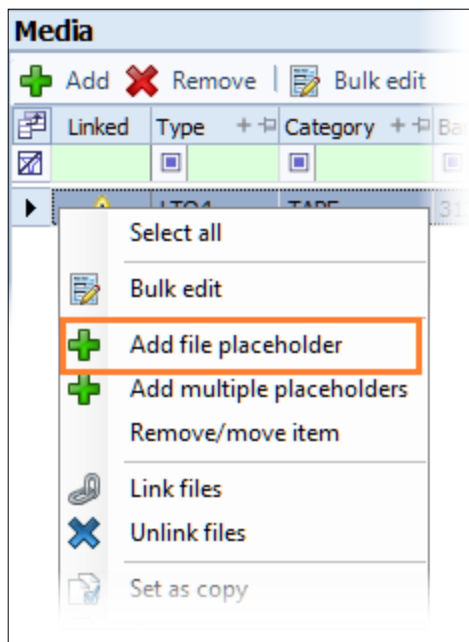
Add file placeholders

A **placeholder** is used to point to media that hasn't been remediated.

Creating a placeholder adds a new file record in the **Files** grid and automatically links to the file to the selected media. The placeholder becomes available for editing as needed. Exploration Archives generates a file ID for each new file placeholder.

To add a file placeholder for an individual media:

1. Select a media item from the **Media** grid that your file placeholder will link to.
2. Right-click on the media and select **Add file placeholder**.

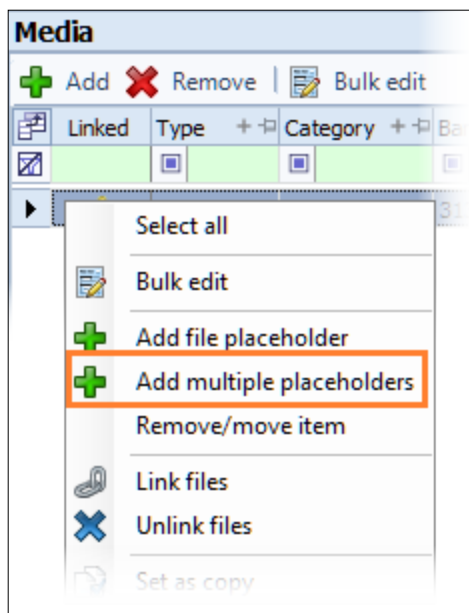


A new row is instantly added to the **Files** grid with an auto-generated **File ID**. The media automatically links to the file placeholder.

3. Enter the associated information for the file placeholder, as applicable.
4. Click **Save**.

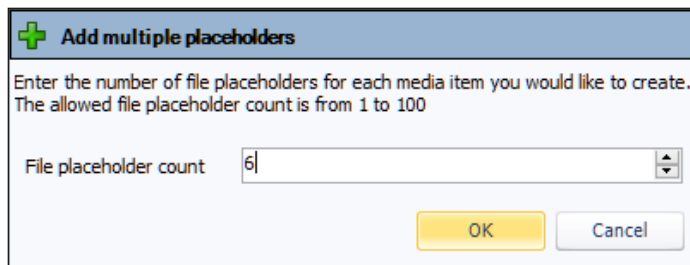
To add more than one placeholder for one or more media...

1. Select the media row(s) in the **Media** grid that require more than one file placeholder each.
2. Right-click on the media and select **Add multiple placeholders**.



A pop-up opens for you to specify the number of placeholders per media you want to create.

3. Select a number and click **OK**.
New rows add to the **Files** grid with auto-generated **File IDs**. Each media automatically links to specified number of file placeholders.

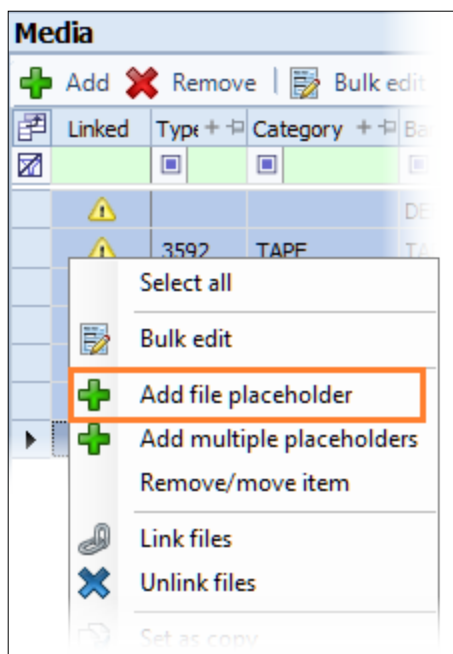


A dialog box titled "Add multiple placeholders" with a green plus icon. It contains the text: "Enter the number of file placeholders for each media item you would like to create. The allowed file placeholder count is from 1 to 100". Below this is a text input field labeled "File placeholder count" with the number "6" entered. At the bottom right are "OK" and "Cancel" buttons.

4. Enter the associated information for each placeholder, as applicable.
5. Click **Save**.

To simultaneously add a placeholder to multiple media:

1. Select multiple media items in the **Media** grid.
2. Right-click on the media and select **Add file placeholder**.



A file placeholder is automatically created in the **Files** grid for each selected media, using a one-to-one linking.

3. Enter the associated information for each placeholder, as applicable.
4. Click **Save**.

Link files to media



Note:

Media is anything that is a storage device including a server, tape, map, optical, section or support media. Digital files must be linked to the host server.

The **Media** grid of the **Catalog** module is a working space for media items.

Linking files to a media will associate the files to the media in your data repository.

Exploration Archives supports many-to-many linking with the following scenarios:

- » Multiple media to multiple files
- » Multiple media to one file
- » One media to multiple files

The Catalog module offers two methods for linking files and media; a drag and drop action and a context menu command.

Option 1: Use drag and drop to link files to media

The drag and drop method is reciprocal. Dragging from the media to the file grid produces the same results as dragging from the file grid to the media grid.

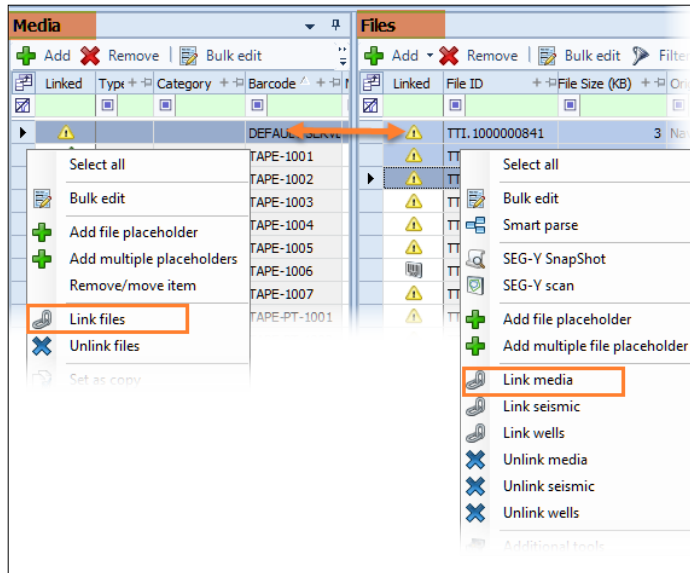
1. Click to select a file in **Files** grid.
2. Click and hold the file. Drag and drop the file to the media item in the **Media** grid.
The **Linked** columns update in each grid to show the linked icon.

Option 2: Use the context menu to link files to media

The linking action is reciprocal. The **Link files** action from the **Media** grid and the **Link media** action from the **Files** grid produce the same results.

1. Click to select the media item(s) in the **Media** grid.
2. In the **Files** grid, select the item(s) associated to the media.
3. Right-click in the **Files** grid to open the context menu. Select **Link files**.
The **Linked** columns update in each grid to show the linked icon.
The **Links** tab in the **Related Records** panel displays the media linked to a file selected in the **Files**

grid.



Verify file links

Particular linking must be established to complete a catalog session.

The required linking includes:

- » Each file must link to at least one seismic.
- » Each media must link to at least one file.

The **Catalog** module provides several features for verifying the links.

Link icons

The **Linked** column in the **Media** and **Files** grids indicates the linking relationships. Hover over the icons in the column to display the link definition.

For items in the **Media** grid, the linked icon indicates either linked to file or no links.

Files accommodate more versatile linking and the **Linked** column displays various linking icons.

Files grid Linked definitions:

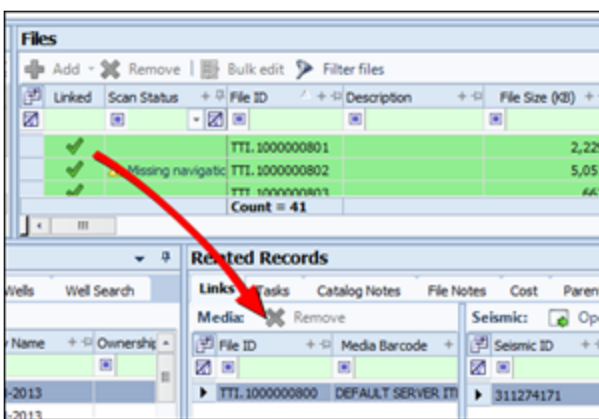
-  No links
-  Linked to media only
-  Linked to seismic or well only
-  Linked to both media and seismic or well

**Note:**

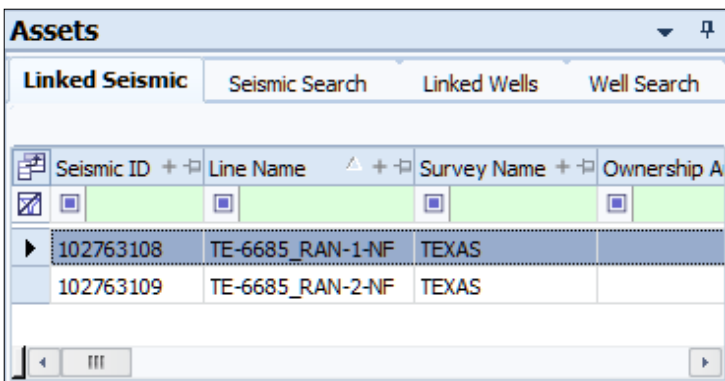
Items in the Files grid have a shaded background. A green background means the file is linked. A yellow background means you're missing a link to satisfy the required checks for files before you can push the items in production. Files that don't have a colored background haven't been linked yet.

Related Records Links tab

The **Related Records** panel includes a **Links** tab that displays the links of a selected file. Click on a file in the **Files** grid. Open the **Links** tab in **Related Records**. The links for the particular file display in separate panes for **Media**, **Seismic** and **Wells**.

**Assets panel**

The **Assets** panel includes a **Linked Seismic** and **Linked Wells** tab. Click on these tabs to view the associated list of linked assets.



The **Seismic Search** and **Well Search** tabs include a linked icon  in the leader column for any linked assets that display in the list of search results.

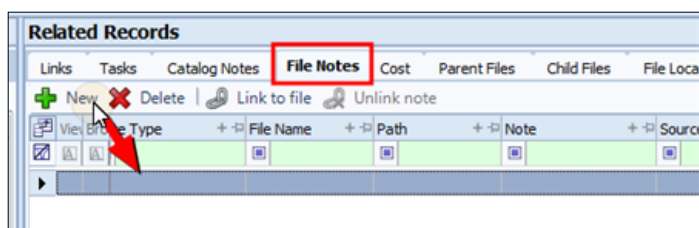
Add file notes and attachments

The **Related Records** panel of the **Catalog** module includes a **File Notes** tab for adding notes or attaching a document for supplementary information. This is useful for attaching transmittals, SEG-Y headers or any other file-related document.

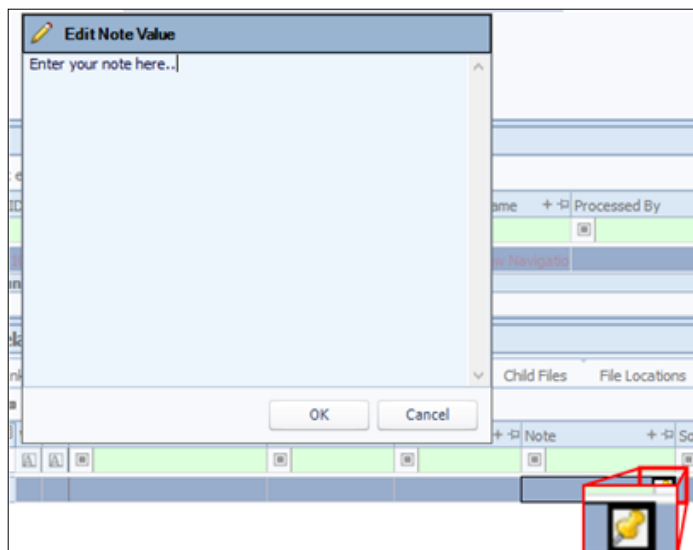
You can link file notes to a single file or to multiple files. When you initially create a note, it links to the file that you have selected in the **Files** grid. To link to multiple files, use the **Link to file** button in the **File Notes** tab. Refer to "Link notes to multiple files" on page 117 for details.

To create a file note:

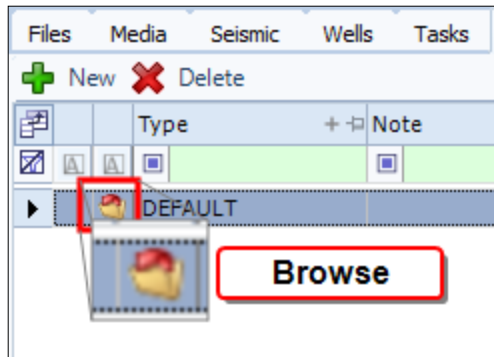
1. Select the target file in the **Files** grid.
2. Click the **File Notes** tab in the lower panel.
3. Click **New** to create a new note. A row populates in the grid for you to edit.



4. Select the entry type in the **Note Type** column.

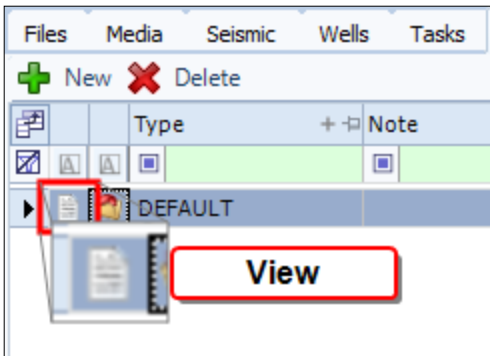


5. To add text in the **Note** column, hover over the cell to activate the enter icon . Click the icon to open the entry window.
6. Type the note details and click **OK**.
7. To add an attachment, click browse in the row to open the browser window.



8. Navigate to the file location, select the file and click **Open**. The file details populate in the **File Name** and **Path** columns.
9. Click **Save**.

To view a file, click **view** in the leader column.

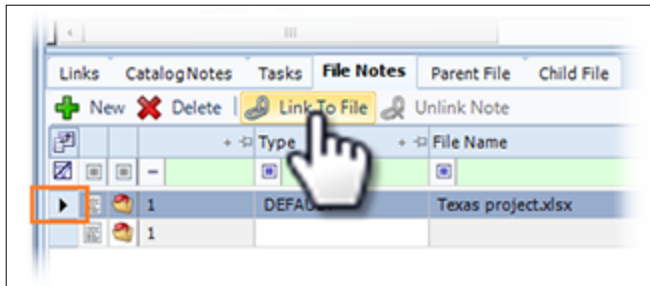


Link notes to multiple files

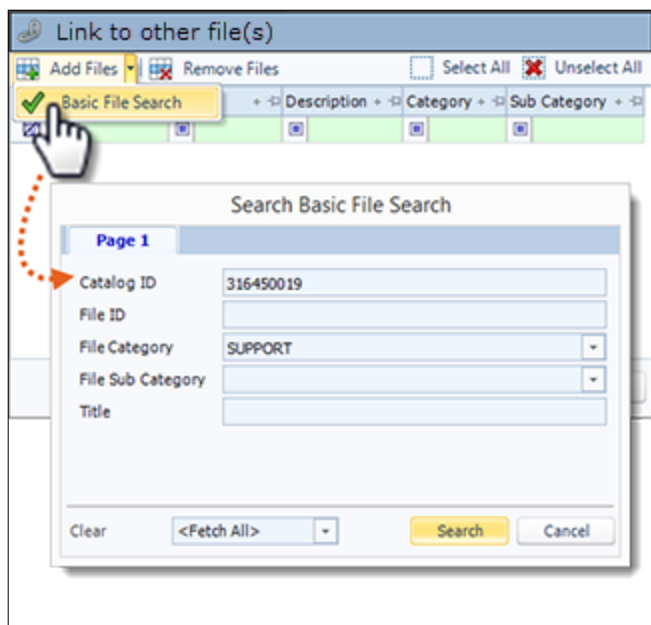
When you initially create a note, it links to the selected file in the **Files** grid. To link to multiple files, use the **Link to file** button in the **File Notes** tab.

To link a note to multiple files:

1. Select the target note in the **File Notes** tab and click **Link to file**. The **Link to other file(s)** window opens.

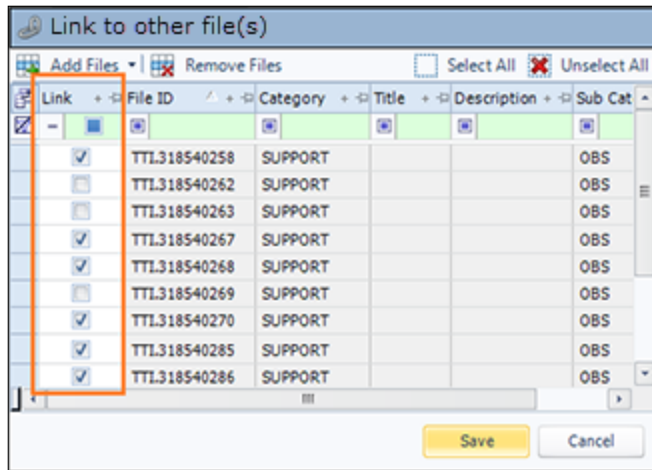


2. Click **Add Files** and select a search option to search the files.



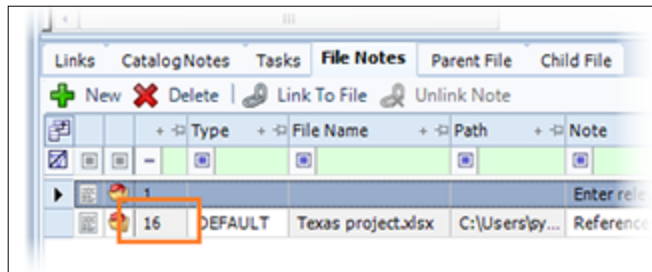
A search window opens. The scope of the search only includes the files that are in the current catalog session, as indicated in the image by the **Catalog ID**.

3. In the new window, select your search criteria and click **Search**. The results populate in the **Link to other file(s)** window.
4. In the **Link** column, select the files to link the note to.



5. Click **Save**.

The window closes and the **File Notes** tab displays the number of files the note is linked to.



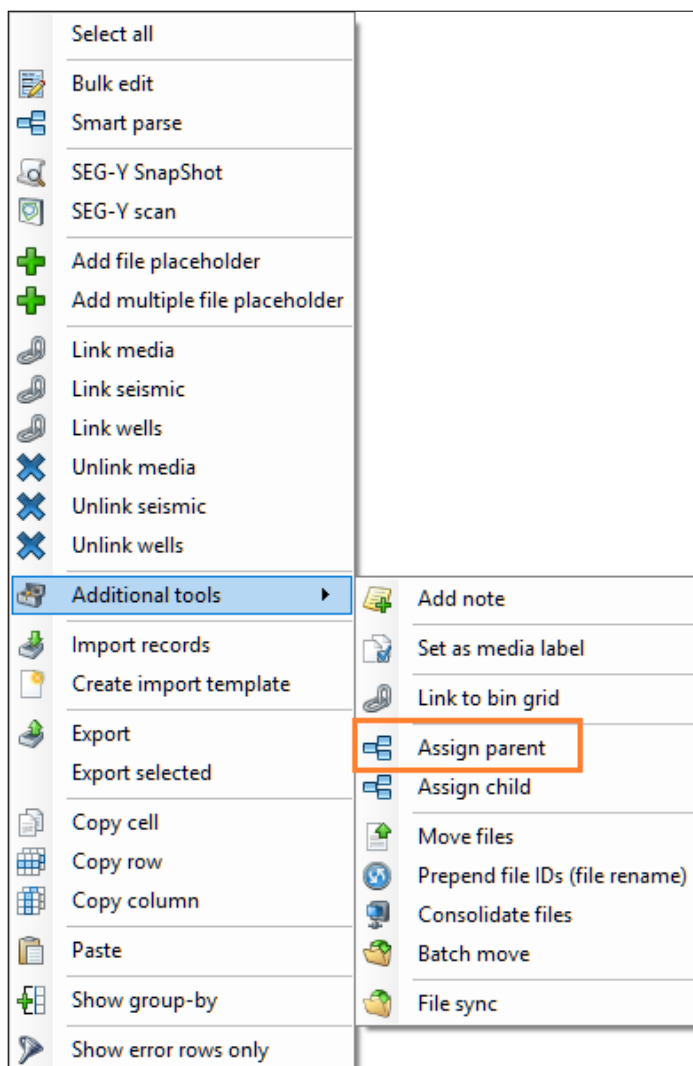
Assign a parent file

In the **Catalog** module, use the **Files** grid to assign a parent file. When complete, the assigned parent files display in the **Parent Files** tab of the **Related Records** panel.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

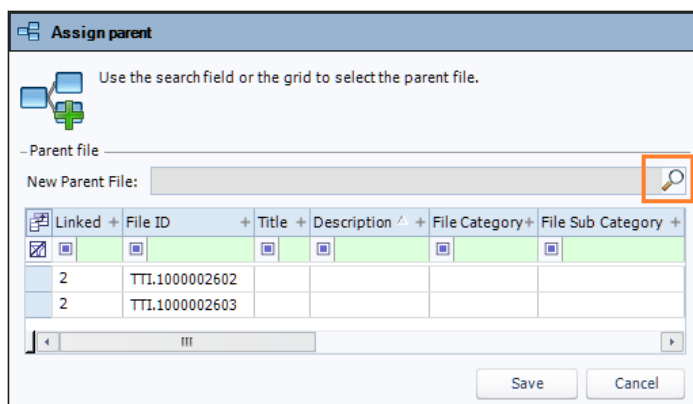
To assign a parent to one or more items:

1. Use one of the following methods to select the item(s) in the **Files** to create a parent relationship:
 - » Click to select a single row.
 - » To select multiple consecutive rows, click and drag in the leader column in the grid.
 - » To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign parent**.



The **Assign parent** window opens.

4. Either select an item in the grid or search for the parent item(s) to assign and select.



If you select an item in the grid, that item will become the parent of the others in the **Files**.

If you search and select an item, the new item will become the parent of the others in the **Files**.

5. Click **Save**.

The assigned parent record displays in the associated tab in the **Related Records** panel.

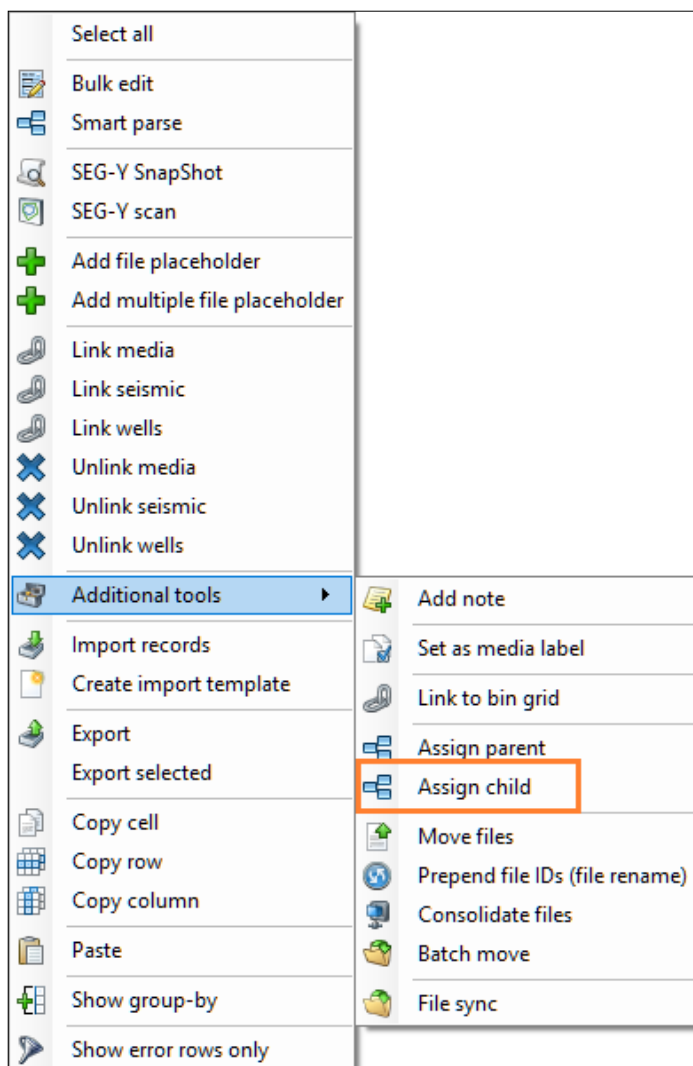
Assign a child file

In the **New Item Catalog** module, use the main **Files** grid to assign a child file and use the **Child File** tab in the associated records area to view the results.

Exploration Archives accommodates a many-to-many relationship for parent and Related Records. A parent record can have multiple children and a child record can have multiple parents.

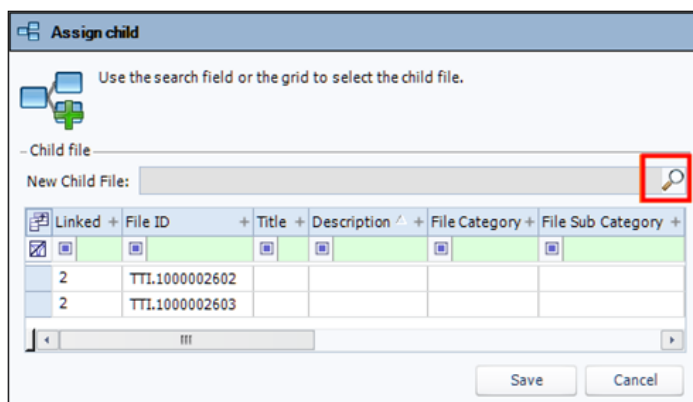
To assign a child to one or more items:

1. Use one of the following methods to select the item(s) in the **Files** to create a child relationship:
 - » Click to select a single row.
 - » To select multiple consecutive rows, click and drag in the leader column in the grid.
 - » To select multiple individual rows, press Ctrl while clicking to select.
2. Right-click on a selected row to open the context menu.
3. Point to **Additional tools>Assign child**.



The **Assign child** window opens.

4. Either select an item in the grid or search for the child item(s) to assign and select.



If you select an item in the grid, that item will become the child of the others in the **Files**.

If you search and select an item, the new item will become the child of the others in the **Files**.

5. Click **Save**.

The assigned child record displays in the associated tab in the **Related Records** panel.

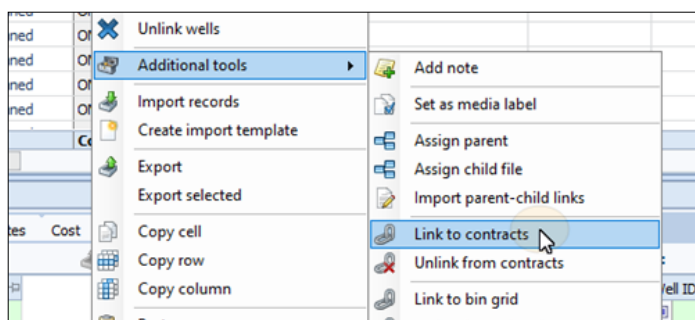
Link File to Contract

The **Files** panel of a **Catalog** lists all the files attached to it.

Files can also be attached to existing contracts.

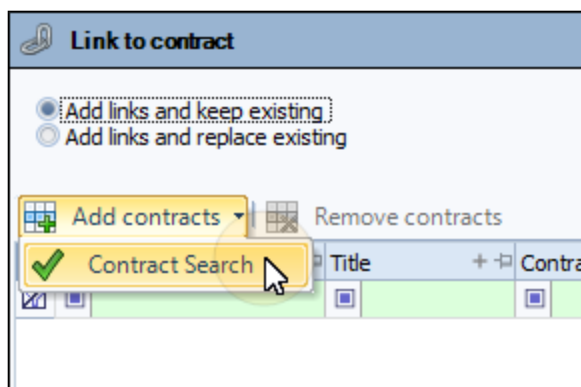
To link a file to a Contract in the Catalog Module:

1. In the Catalog Properties panel, double-click on a catalog to open it in a new tab.
2. Once the catalog is open, select a file or multiple files in the Files panel.
3. Right-click the selected files to open the context menu. Select **Additional Tools>Link to contracts**.



The Link to Contracts window opens.

4. In the Link to contract window select **Contract Search** from the Add Contracts drop-down.



5. Enter your search criteria, then click **Search**. The results will populate the grid in the Link to contracts window.
6. From the results, select the check box next to the contracts to be linked.

 **Link to contract**

☒ Add links and keep existing
☐ Add links and replace existing

 Add contracts

 Remove contracts

 Check All

 Uncheck All

	Contract Number	Title	Contract Status	Contract Type
				
	123456		ACTIVE	TESTDATA
			ACTIVE	TESTDATA
	GS23456		ACTIVE	MORE TESTDATA
	 GS23456_GS		ACTIVE	MORE TESTDATA

**Tip:**

You can also click **Check All** to select all the contracts in the list.

7. Select the option to either add links and keep existing or to add links and replace existing for the selected files.
8. Click **Save**.
9. The contracts will appear under the Contracts tab in the Related Records panel for each file that was selected.

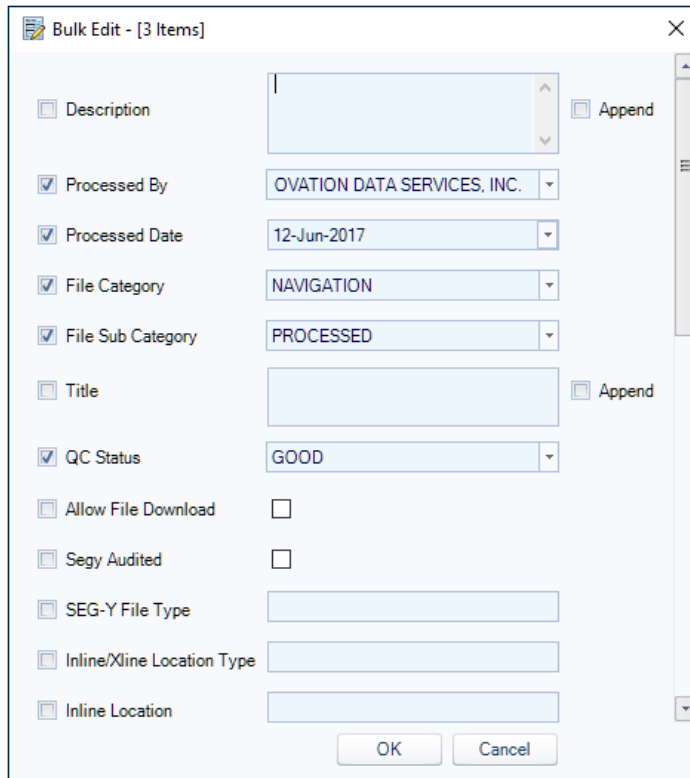


Update metadata

The metadata for a file describes the data details of an item. Exploration Archives uses metadata for cataloging and locating resources.

To update shared metadata across for file items or media, use the **Bulk Edit** tool.

1. In the leader column of the **Files** or **Media** grid, click and drag to select multiple rows.
2. In the toolbar click **Bulk edit**.



The image shows a 'Bulk Edit - [3 Items]' dialog box. It contains several fields for editing file metadata. The fields are: Description (text input), Processed By (dropdown menu with 'OVATION DATA SERVICES, INC.' selected), Processed Date (dropdown menu with '12-Jun-2017' selected), File Category (dropdown menu with 'NAVIGATION' selected), File Sub Category (dropdown menu with 'PROCESSED' selected), Title (text input), QC Status (dropdown menu with 'GOOD' selected), Allow File Download (checkbox), Segy Audited (checkbox), SEG-Y File Type (text input), Inline/Xline Location Type (text input), and Inline Location (text input). There are 'Append' checkboxes next to the Description and Title fields. At the bottom are 'OK' and 'Cancel' buttons.

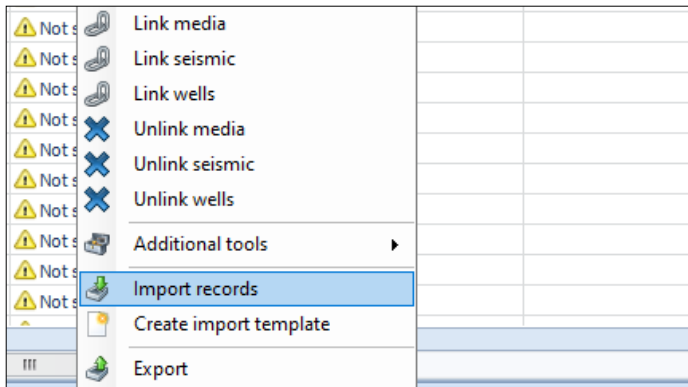
3. Enter details to edit. Scroll to view all field options.
4. Click **OK**. The new information displays in the **Files** or **Media** grid.
5. Click **Save**.

Import Records

Besides having the ability to add files to a catalog, you can also import records using a Microsoft Excel file.

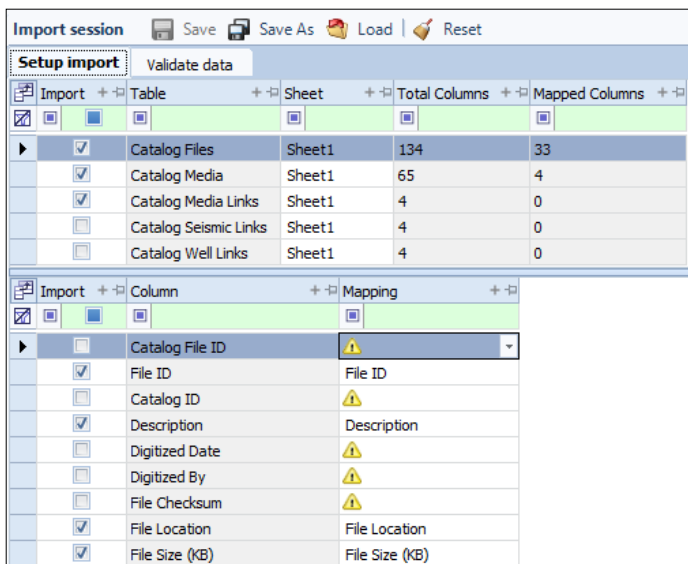
To import records:

1. In the Catalog Properties panel, double-click on a catalog to open it in a new tab.
2. Once the catalog is open, select a file or multiple files in the Files panel.
3. Right-click the selected files to open the context menu. Select **Import records**.



4. When the file explorer opens, navigate to the location of the file and select it.
5. Click **Open**. The import records window opens. The window is split into 2 tabs:

Setup Import: This tab is used to Map the columns of the Excel file to the columns in the files grid.



On the top half of the window select the sheet in the excel file you want to use for the field. You can use more than one sheet, just select it from the drop-down in the sheet column.



Note:

You can also restrict which sheet the data is imported from by selecting the Single Sheet checkbox, located in the right corner.

The column headings will map to the appropriate column on the grid in the bottom half.



Note:

If you want to save your setup and import the data later, click **Save**. Click **Load** to recall the settings and continue the import.

You can confirm the data by going to the **Validate data** tab.

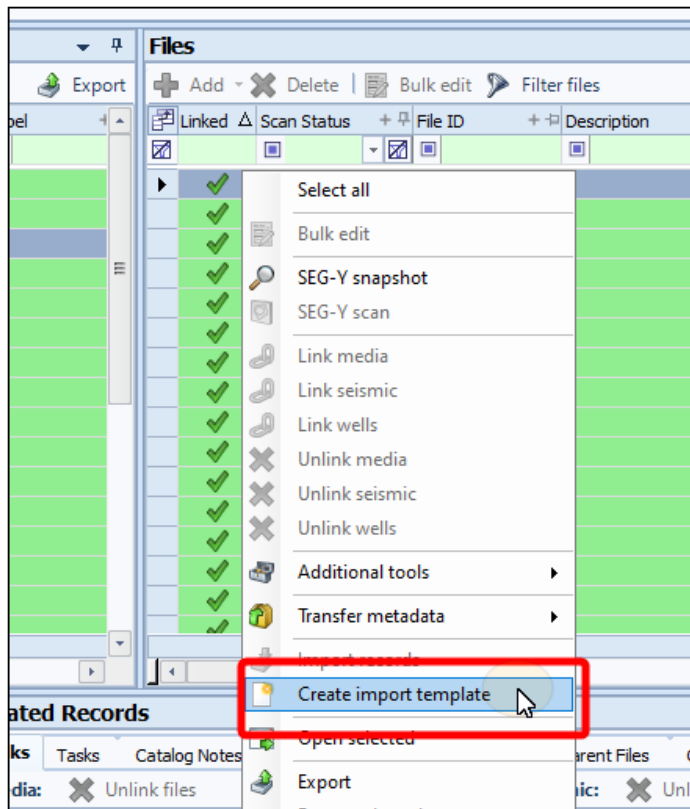
6. Once you have imported and validated the data, click **Import**. The window will close and the records will be added to the files panel.

Create an Import template

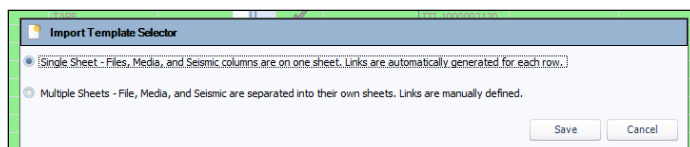
When importing records from an Excel file it's beneficial to be able to create an import template. This tool will create a blank file that you can fill in and then use to import the records.

To create an Import template:

1. Open a Catalog session.
2. In the **Files** or **Media** panel, right click and select **Create import template** from the context menu.

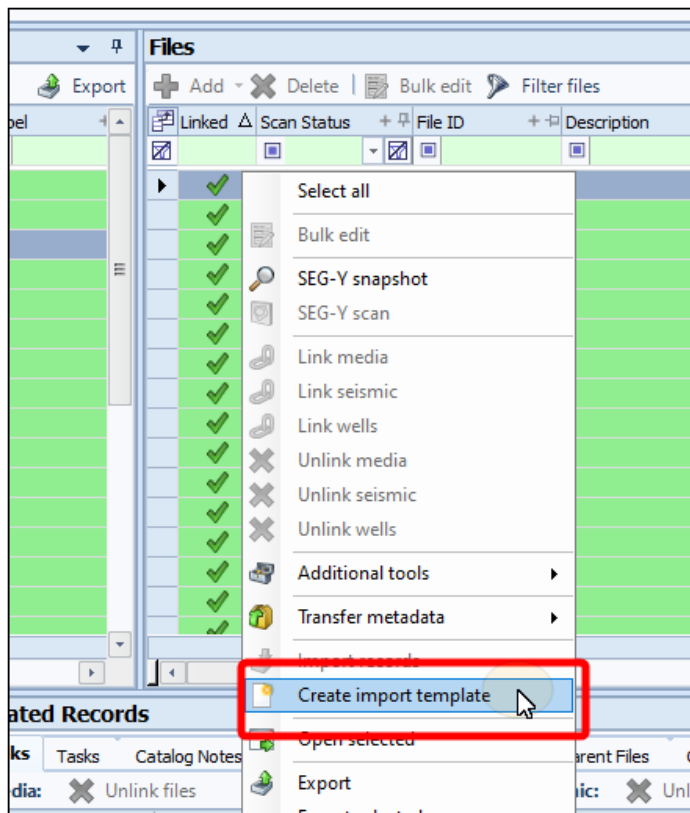


3. The **Import Template Selector** opens.



4. Select between creating a single sheet or multiple sheets. The tool will export columns that can be imported based on the configuration.
5. Click **Save**. The **save file** panel opens.

6. Navigate where you want to save the template, then select **Save**.
7. The template will be saved, and will open in Microsoft Excel.
1. Open a Catalog session.
2. In the **Files** or **Media** panel, right click and select **Create import template** from the context menu.



3. The **save file** panel opens.
4. Navigate where you want to save the template, then select **Save**.
5. The template will be saved, and will open in Microsoft Excel.

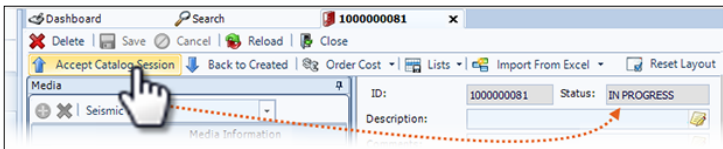
4.6 Accept a catalog session

A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities. To begin performing cataloging activities, you must move the session to the *In Progress* status.

To change the status to In Progress:

Open a catalog Session.

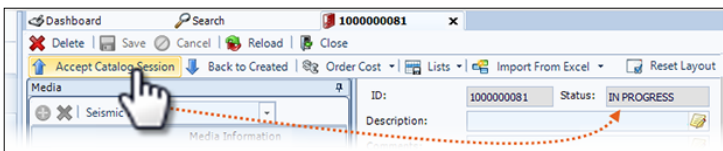
Click **Accept Catalog Session**.



The status of the session changes to *In Progress* and is ready for you to begin the cataloging activities.

A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities. To begin performing cataloging activities, you must move the session to the *In Progress* status.

To change the status to *In Progress*, click **Accept Catalog Session**.



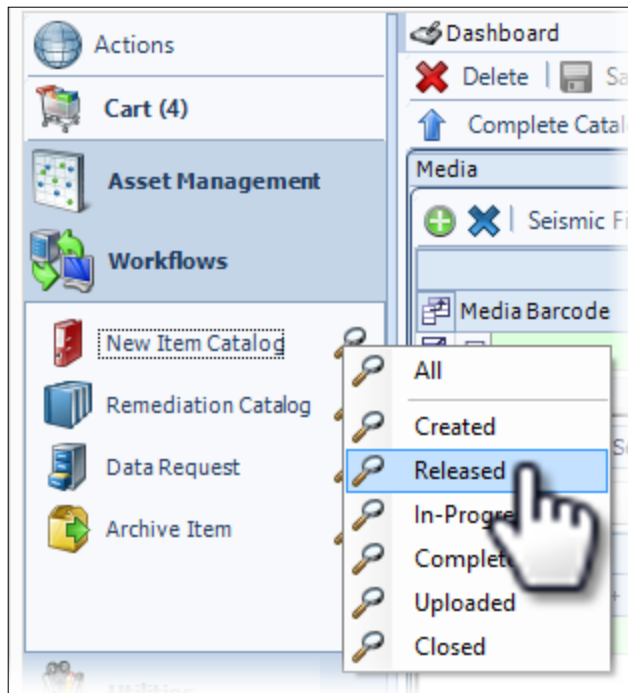
The status of the session changes to **In Progress** and is ready for you to begin the cataloging activities.

Locating a Released session

A catalog session in the *Released* status is ready for you to accept and begin the cataloging activities.

To find the released catalog session:

1. Under **Workflows**, click search next to **New Item Catalog**.



2. Select **Released**. The **Search** module opens and display the list of all *Released* catalog sessions.
3. To narrow the results and locate your target catalog session, use the filter row. Type relevant detail in a field in the top row of the grid.

Catalog Sessions x Catalog Sessi... x

Records (9)

Drag a column here to group by that column

Session ID	SessionDescription	Session Status	File C
1000003	ALG-002 Field Tapes	RELEASED	
363090034		RELEASED	

The table has a filter row at the top of the data area, which is highlighted with a red rectangle. It contains input fields for filtering the data.

4. Locate the catalog session in the grid and double-click the row to open the session in the **New Item Catalog** module.

4.7 Using SEG-Y Scan™



Note:

SEG-Y Scan is available in both the **Catalog** module and the **File** module. These instructions are in reference to the **Catalog** module.

SEG-Y Scan converts your SEG-Y data files into compressed replicas for quick viewing. The scanning process extracts the set of coordinates, data from the EBCDIC header, SEG-Y attributes and SEG-Y cataloging detail. Using the extracted data, Exploration Archives generates images that you can view using SEG-Y SnapShot.

The generated images include:

- » Live trace outline for each file
- » Amplitude map
- » Time sections
- » Time slice
- » Histogram of trace sample values

Identifying the scan status

In the **Catalog** module, the **Scan Status** column in the **Files** grid indicates whether a file has been scanned or not.

Files in a .sgy format are available for scanning and display a status in the **Scan Status** column as follows:

- » **Not Scanned**: SEG-Y file has not been scanned
- » **Scanned** : File was successfully scanned and outputs are available for viewing in SEG-Y SnapShot
- » **Missing Data**: The scan process was unsuccessful because data is missing from the file
- » **Missing Navigation Data**: The scan process was unsuccessful because navigation data is missing from the file

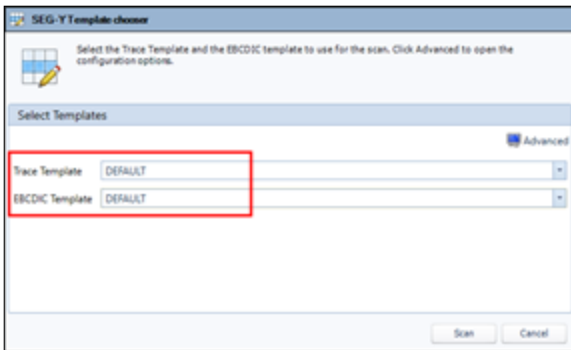
File ID	Scan Status	Location [not + File
TTL.100000000000032579	Scanned	\\Talus-nasea\d...
TTL.100000000000032580	Missing navigation...	\\Talus-nasea\d...
TTL.100000000000032581	Invalid trace headers	\\Talus-nasea\d...
TTL.100000000000032582	XY contains zeros	\\Talus-nasea\d...
TTL.100000000000032583	Not scanned	\\Talus-nasea\d...

Count = 5

Configure SEG-Y Scan templates

SEG-Y Scan converts your SEG-Y data files into compressed replicas for quick viewing. To replicate the files, SEG-Y Scan extracts attribute information from the source files and generates snapshot files for viewing.

The **Trace** template extracts data from the Trace header and the **EBCDIC** template extracts data from the EBCDIC header. The scanning process extracts data from specified locations in the headers, as set in the **Trace** and **EBCDIC** templates.



To extract attribute information, you first create templates to use for scanning the source files. Part of the scanning procedure involves selecting the templates to use for extracting the attributes, and generating the snapshot.

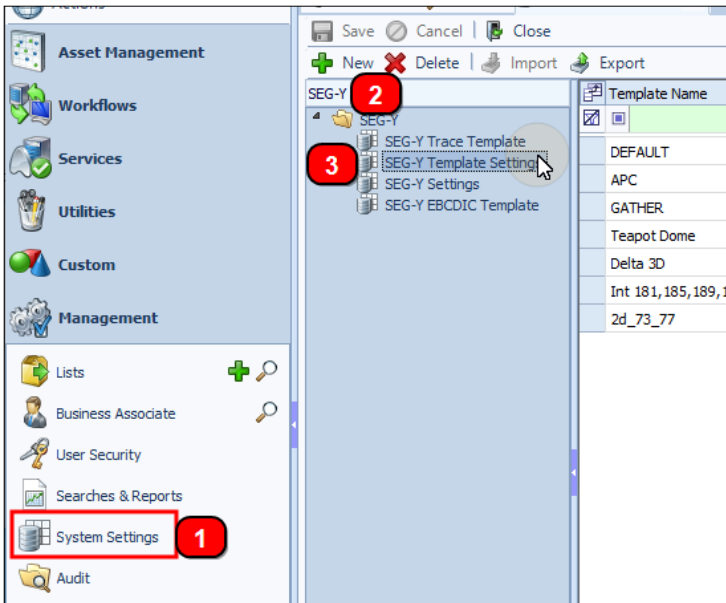
The first step in configuring the templates is to specify the settings for the scan process in when you "Select template settings" below. The next step is to define the following templates:

1. "Define the Trace Template" on page 136: Configure the data locations in the Trace header for the CDPX, CDPY, inline and crossline.
2. "Define the EBCDIC Template" on page 137: Set the card locations for finding and extracting data from the EBCDIC header.

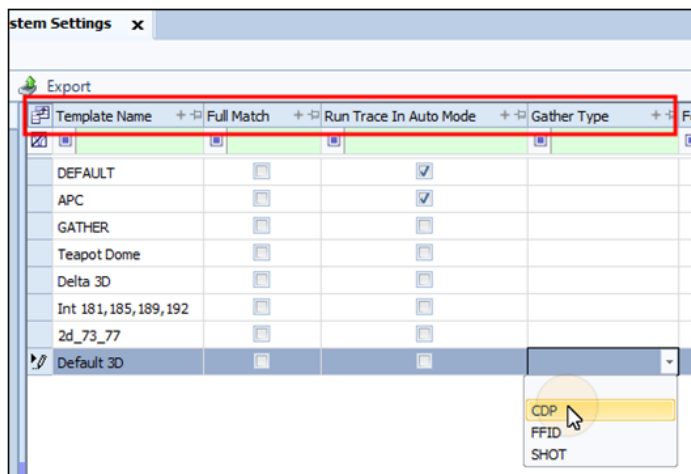
Select template settings

The templates are defined in the **SEG-Y Template Settings** in the **System Settings**.

The first step to specify the scan settings:



1. Under **Management** in the navigation panel, click **System Settings**.
2. Filter the settings to only show **SEG-Y**.
3. From the list, select **SEG-Y Template Settings**. The **SEG-Y Template Settings** grid opens.
4. Click **New**. The grid opens with four columns available to specify settings.



5. In the **Template Name** column, enter an appropriate name.
6. In the **Full Match** column, select to apply to the EBCDIC Template. This setting does not apply to the Trace Template.



Note:

Full Match scans for an exact character match of the data. If an exact match is not found, the scan results indicate as invalid data.

7. In the **Run Trace In Auto Mode** column, select to apply to the Trace Template. This setting does not apply to the EBCDIC Template

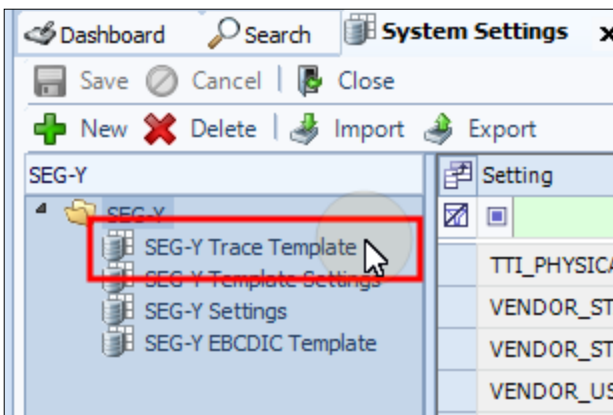
The Trace Template specifies the location of the CDPX-CDPY and the inline-crossline. Select **Run Trace In Auto Mode** if your template has multiple locations to search for a data match. Auto Mode subsequently scans all locations listed in the template until a match is found. Without Auto Mode, the scan checks only the first instance of each location.

8. For the Trace Template, select the **Gather Type** if applicable. If left blank, the process scans files as pre-stack or post-stack.

Define the Trace Template

The grid for defining a Trace Template is located under **Management** in the **System Settings**.

In the **System Settings** select **SEG-Y Trace Template** to open the configuration grid.



Each row in the template grid specifies one location for an information field to extract and write to the generated snapshot. The first several rows are pre-configured with typical attributes and their locations.

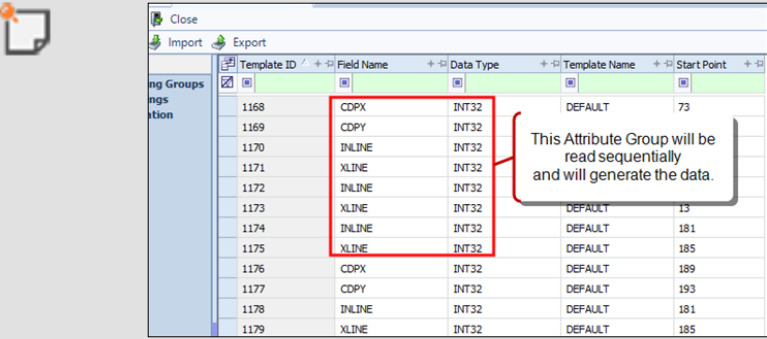


Note:

While a Trace Template can have many locations for extracting data, you must group the attributes in sets of 2 or 4.

There are a couple of scenarios to remember:

- » Where the byte locations are known:
A set of 2 is used for 2D and a set of 4 is used for 3D.
- » The Byte Locations are not known:
If you want a template to check multiple locations then pick the best, you should group the data:



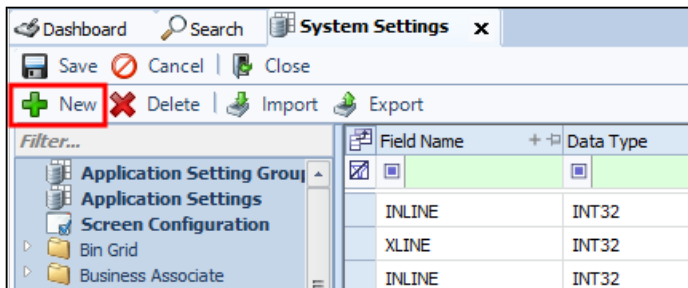
For 2D, you would use multiple sets of x/y pairs.

Be sure that the **Run Trace in Auto Mode** is selected in your [SEG-Y Template Settings](#).

To list locations for multiple sets of data repeat the process for each grouping.

To add data locations:

1. Click **New** to add a new row to the grid.



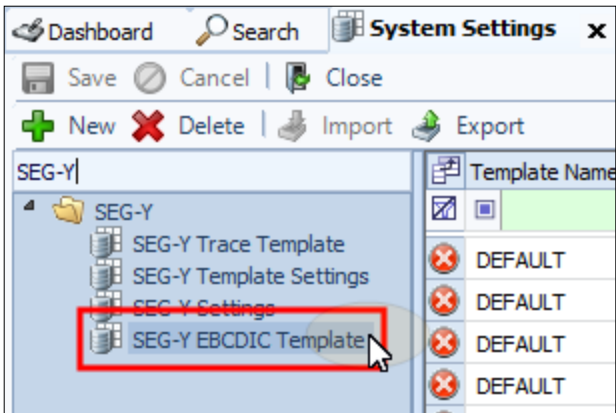
2. In the **Field Name** column, select the attribute .
3. Select the **Data Type**.
4. In the **Template Name** column, select the name of the template to assign the new attribute location.
5. In the **Start Point** column, specify the beginning byte location. SEG-Y Scan calculates the end point automatically based on the data type.
6. Click **Save**.
7. Repeat steps 1-7 to add the remaining data location(s) for your attribute set. Repeat again to add a new set.

If you are adding more than one location for extracting data, be sure that the **Run Trace in Auto Mode** is selected in your [SEG-Y Template Settings](#).

Define the EBCDIC Template

The grid for defining an EBCDIC Template is located under **Management** in the **System Settings**.

In the **System Settings** drop-down options, select **EBCDIC Template** to open the configuration grid.



Each row in the template grid specifies one location for an information field to extract and write to the generated snapshot.

To add the locations of the EBCDIC information to extract:

1. Click **New**. A dialogue message opens for you to confirm if you want to use the template builder.
2. Click **Yes**. The template builder provides assistance with specifying the attribute locations.

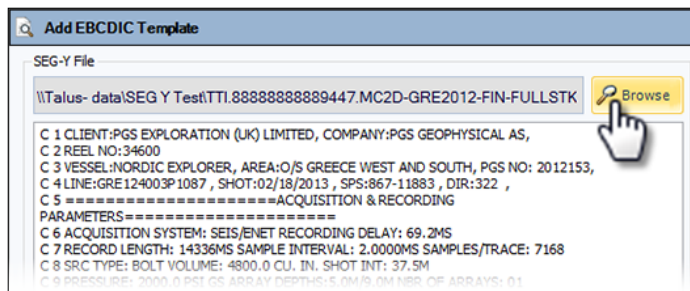


Note:

As an alternative you can enter the information manually in a new row. Click **No** if you want to add a new row and enter manually.

Using the EBCDIC Template builder:

1. In the **Add EBCDIC Template** window, click **Browse**.
2. Browse to the location of your SEG-Y file, select and click **Open**. The text data adds to the template builder for viewing.



3. The **New Template** area provides quick selection options to specify the data extraction locations. Select the **Card No.** for the attribute location.
4. Assign the template pair by selecting the **Template Name**.
5. Select the **Field Name** for the attribute.

Add EBCDIC Template

SEG-Y File
 \\Talus- data\SEG Y Test\TTI.88888888889447.MC2D-GRE2012-FIN-FULLSTK

C 1 CLIENT:PGS EXPLORATION (UK) LIMITED, COMPANY:PGS GEOPHYSICAL AS,
 C 2 REEL NO:34600
 C 3 VESSEL:NORDIC EXPLORER, AREA:O/S GREECE WEST AND SOUTH, PGS NO: 2012153,
 C 4 LINE:GRE124003P1087 , SHOT:02/18/2013 , SPS:867-11883 , DIR:322 ,
 C 5 =====ACQUISITION & RECORDING
 PARAMETERS=====ACQUISITION & RECORDING
 C 6 ACQUISITION SYSTEM: SEIS/ENET RECORDING DELAY: 69.2MS
 C 7 RECORD LENGTH: 14336MS SAMPLE INTERVAL: 2.0000MS SAMPLES/TRACE: 7168
 C 8 SRC TYPE: BOLT VOLUME: 4800.0 CU. IN. SHOT INT: 37.5M

New Template

Card No.	Template Name	Field Name	Start Point	End Point
1	DEFAULT	COMPANY		

Add New

Template Name	Field Name	Sequence	Start Point	End Point
DEFAULT	CLIENT	1	CLIENT:	COMPANY:

Save Cancel

- To specify the character **Start Point** for extracting data, select the text in the viewer and click start point. The selected text pastes to the **Start Point** field. Repeat for the **End Point**.

Add EBCDIC Template

SEG-Y File
 \\Talus- data\SEG Y Test\TTI.88888888889447.MC2D-GRE2012-FIN-FULLSTK

C 1 CLIENT:PGS EXPLORATION (UK) LIMITED, COMPANY:PGS GEOPHYSICAL AS,
 C 2 REEL NO:34600
 C 3 VESSEL:NORDIC EXPLORER, AREA:O/S GREECE WEST AND SOUTH, PGS NO: 2012153,
 C 4 LINE:GRE124003P1087 , SHOT:02/18/2013 , SPS:867-11883 , DIR:322 ,
 C 5 =====ACQUISITION & RECORDING
 PARAMETERS=====ACQUISITION & RECORDING
 C 6 ACQUISITION SYSTEM: SEIS/ENET RECORDING DELAY: 69.2MS
 C 7 RECORD LENGTH: 14336MS SAMPLE INTERVAL: 2.0000MS SAMPLES/TRACE: 7168
 C 8 SRC TYPE: BOLT VOLUME: 4800.0 CU. IN. SHOT INT: 37.5M

New Template

Card No.	Template Name	Field Name	Start Point	End Point
1	DEFAULT	COMPANY	COMPANY:	

Add New

Template Name	Field Name	Sequence	Start Point	End Point
DEFAULT	CLIENT	1	CLIENT:	COMPANY:

Save Cancel

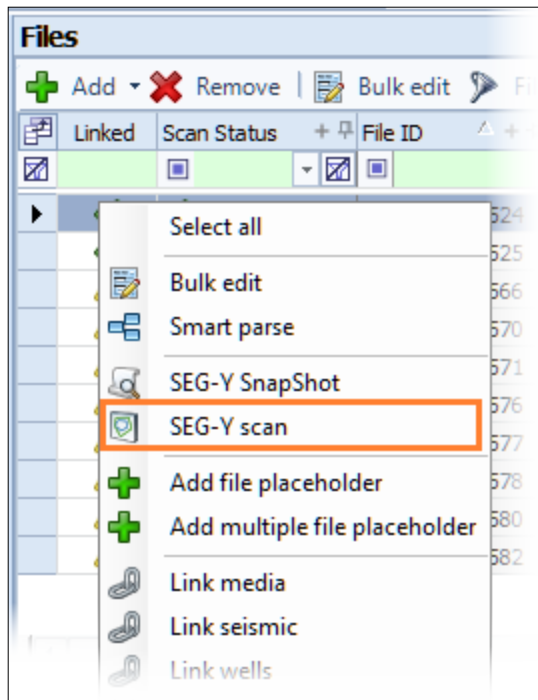
- Click **Add New**.
- Repeat steps 3-7 to add all the extraction points. When complete, click **Save**.

Add files to SEG-Y Scan

As part of your cataloging procedures, the files that are in a .sgy format are available for scanning.

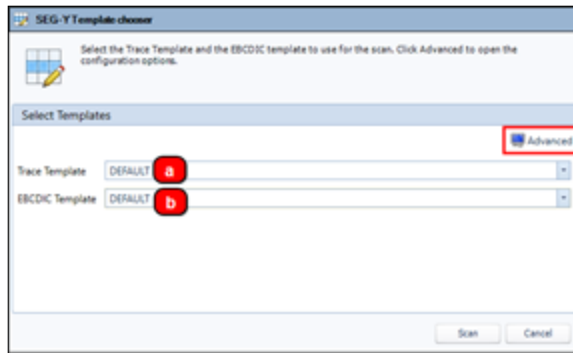
To prepare **SEG-Y Scan** for scanning files:

1. Use one of the following methods to select the files to add to SEG-Y Scan:
 - » Click to select one row in the **Files** grid.
 - » To select multiple individual rows, press Ctrl while clicking to select.
 - » To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row and click **SEG-Y Scan** in the context menu.



3. The **SEG-Y Template chooser** window opens.
4. When the **SEG-Y Template chooser** window opens it is in the **Basic** scanning mode. In this mode, all the files are scanned with the same Trace and EBCDIC templates.

To configure a scan in Basic mode:

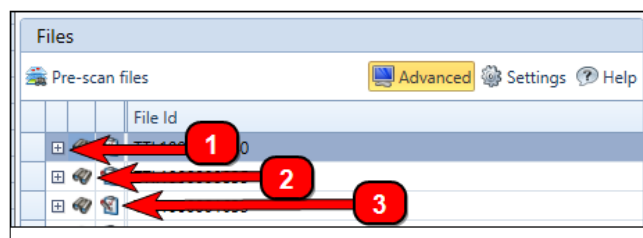


- a. Select the Trace Template from the drop-down list.
- b. Select the EBCDIC Template from the drop-down.
5. Click **Advanced** adjust settings for each selected file.

The Advanced widow is divided into 3 panels:

» Files:

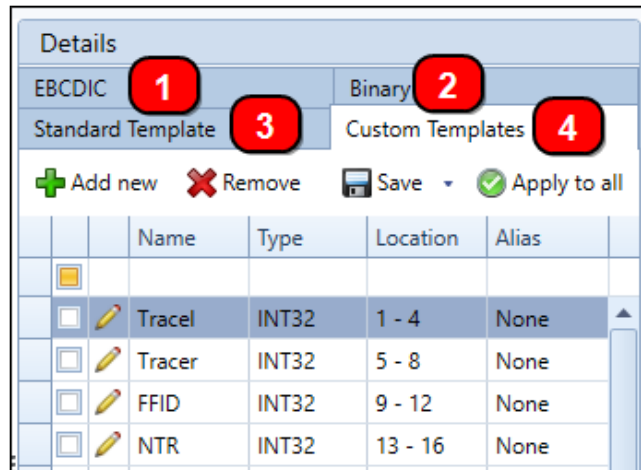
This panel displays all the records that have been selected for scanning. Each row represents one record. There are 3 icons available with each record:



1. **Information:** When you select this icon a dialogue will open showing the information for the record.
2. **Inspection:** Activates the Inspection Process and activates the Quality Control panel. Inspection parses the EBCDIC and Binary Headers and a Trace Header if one is assigned.
3. **Custom Template:** Overrides the existing Trace Template on the file. This will force the scan to run the file in custom mode using the override.

» Details:

The Panel is broken into 4 tabs:



1. **EBCDIC**: Displays the EBCDIC Header in ASCII format.
2. **Binary**: Displays the values from the binary header
3. **Standard Template**: Provides the standard byte locations. Select the standards to use for reading the data from the SEG-Y File.

To save the selected standards to use as a template right-click and select **Add to template**.

To set an alias to use when generating the spacing and sawtooth validations, right-click and select Set alias and select the alias to use.

4. **Custom Templates**: Displays the trace template details based on your selected template.

It includes the option to **Add new** or **Remove** templates from the custom list.

To save template options to a new template, click the **Save** drop-down and select **Save as new template**.

Edit an existing template by selecting the Pencil icon.

Select the templates on the list then click **Save**.

» **Quality Control:**

The panel is divided into 4 sections:

CDPX 205	CDPY 209	INLINE 197
1710927	563174	1001
1711036	563155	1001
1711144	563136	1001
1711252	563117	1001

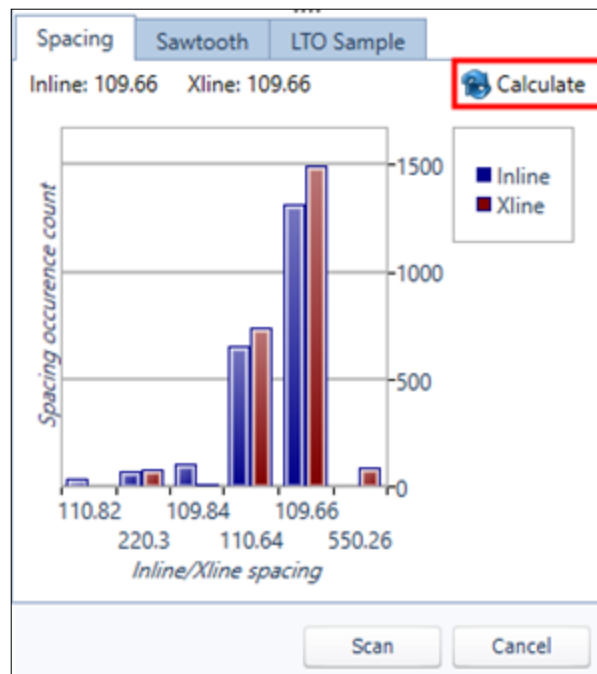
Count=5000

Spacing Sawtooth LTO Sample

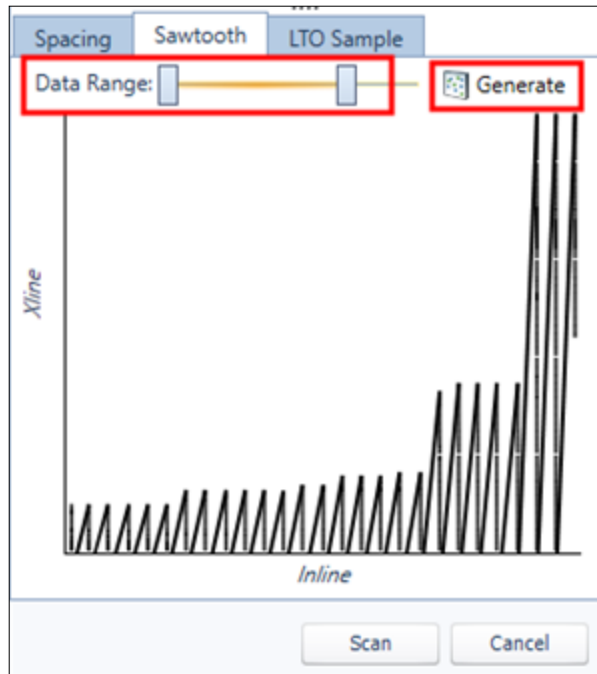
Inline: 109.66 Xline: 109.66 Calculate

1600

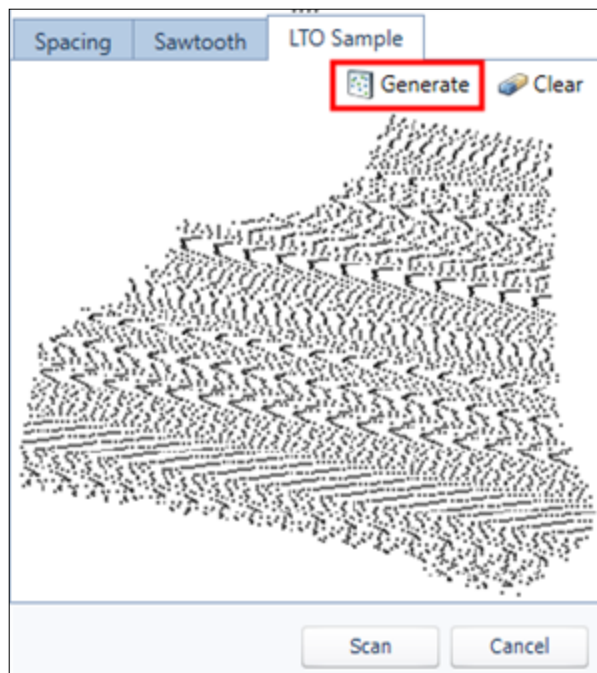
1. **Grid:** The grid displays the trace data from the SEG-Y based on the selected standard and custom templates. The values in this grid are used to generate the spacing and sawtooth charts.
2. **Spacing:** Click **Calculate** to view the spacing on a graph



3. **Sawtooth:** Click **Generate** to see a graphical representation. Use the **Data Range** slider to change the number of traces being used.



4. **LTO Sample**: click Generate to create the sample. To clear the panel, click **Clear**.



To start the scan process, refer to "Starting SEG-Y Scan" on the next page.

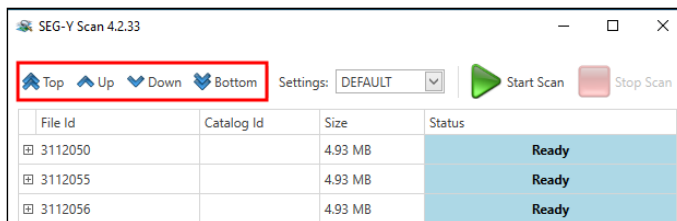
Starting SEG-Y Scan

After adding files to SEG-Y Scan and specifying the settings, you can start the scan process.

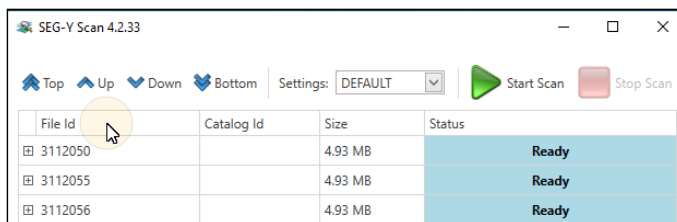
SEG-Y Scan opens with the selected files listed with a **Ready** status.

The application performs the scan in the order that the files are listed. Before starting the scan, you can change the priority order of the files.

- » To move a file to a different priority in the list, select the file move it using the **Top**, **Up**, **Down** and **Bottom** buttons.

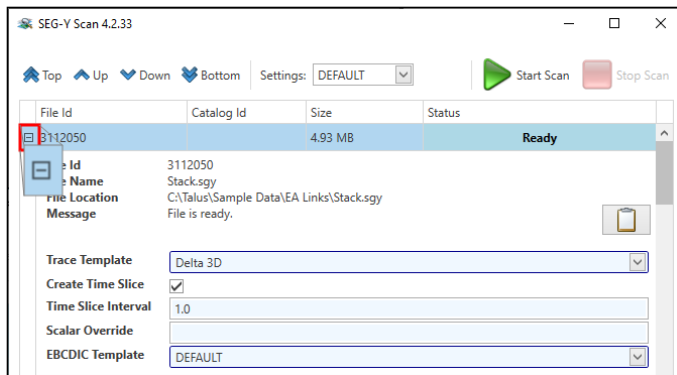


- » To display the list either ascending or descending by column category, click the column header.

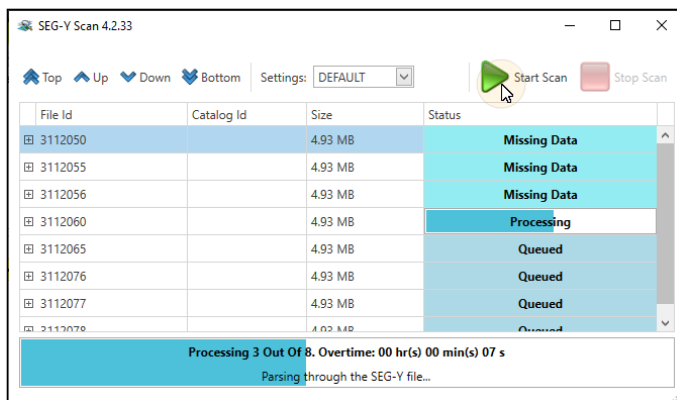


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- » To view file details or to change the specified template for a file, click the down arrow in the leader column to expand the file information.



- » Click **Start** when you are ready to begin the scan. As the scan progresses, the **Status** column displays the status of each file.



When complete, an information window opens and displays the result details of the scan. Click **OK**. The **SEG-Y Scan** window remains open for you to continue working.

To view the scan results in the **Files** grid, click **Reload** in the workspace toolbar. The **Scan Status** updates in the grid and displays detail for any files that had missing data.

SEG-Y Scan operates independently from Exploration Archives and will not interfere with performance. You can continue working in Exploration Archives while the scan completes.

For quick access to **SEG-Y Scan** while in progress, click on the icon in your taskbar

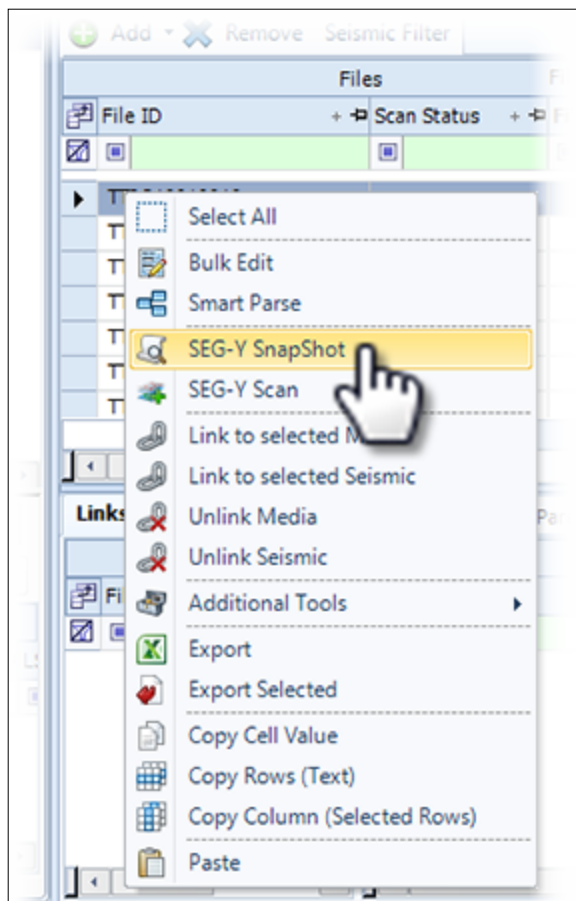
View files with SEG-Y SnapShot

During your cataloging process, you can view your scanned files using SEG-Y SnapShot. While these instructions pertain to the **Catalog** module, SEG-Y SnapShot is also available from the **File** and **Seismic** modules.

Files that appear in the **Files** with a **Scanned** status are available for viewing in **SEG-Y SnapShot**.

To view files in **SEG-Y SnapShot**:

1. Use one of the following methods to select **Scanned** files for viewing:
 - » Click to select one row in the **Files** grid.
 - » To select multiple individual rows, press Ctrl while clicking to select.
 - » To select multiple consecutive rows, click and drag in the leader column in the grid.
2. Right-click on a selected row, point to **Tools** and select **SEG-Y SnapShot** in the context menu.



The **SEG-Y SnapShot** window opens.

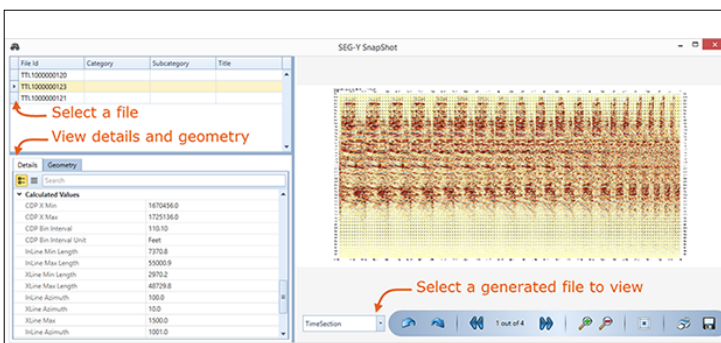
The grid in the upper left displays the files you selected for viewing. Click to select a file to view.

The lower left grid displays the **Details** tab and the **Geometry** tab. Click a tab to view the associated information.

The panel on the right displays the generated snapshot files:

- » Time Slice
- » Live Trace Outline
- » Time Section
- » EBCDIC
- » Report

Click the drop-down to select a snapshot view. Use the navigation bar to browse, print or save the files.



4.8 Use Smart Parse to extract metadata

Smart Parse is an efficient method for assigning details to category fields in the Exploration Archives grids. **Smart Parse** allows you to parse a file name and/or path to look for information that will link the file to media or seismic. It also allows you to set strings of text as various attributes on the file.

You can extract metadata from **Smart Parse** to:

- » Link files to media based on barcode.
- » Link files to seismic based on the seismic name.
- » Set the **Title** field.
- » Set the **Description** fields.
- » Assign the **Category** and **Sub-category**.

To open **Smart Parse**:

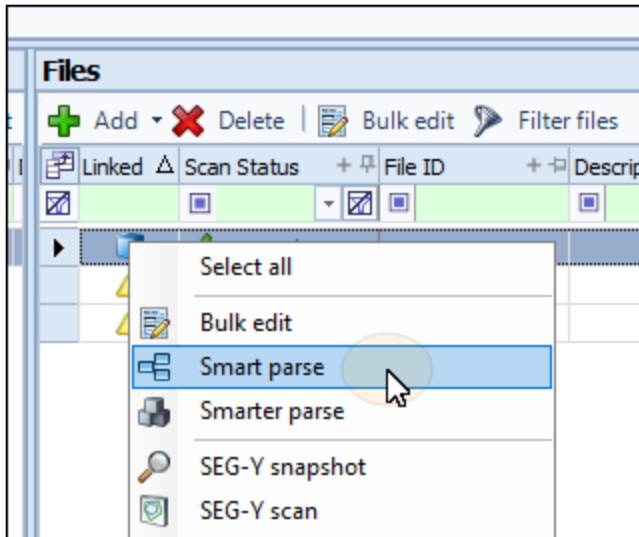
1. Start a catalog session. In the **Files** grid, select the file rows to be parsed.



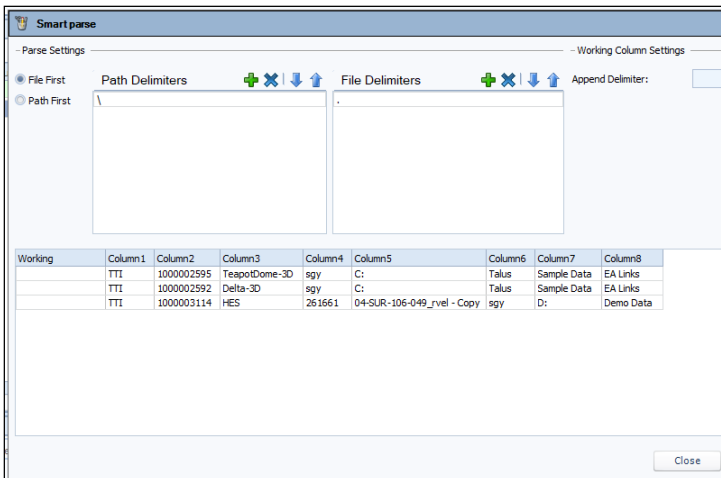
Tip:

Use **Ctrl+Shift** to select multiple rows that are not grouped together.

2. Right-click and select **Smart Parse**.



The **Smart Parse** window opens with segments of the file path (metadata) divided into columns.

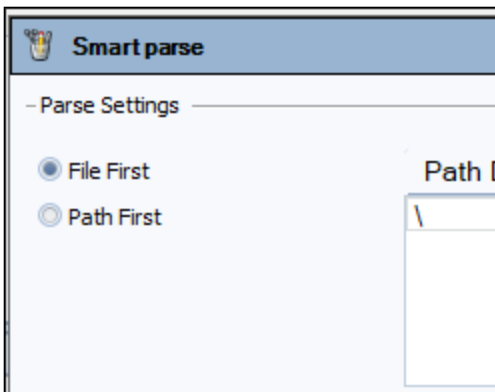


Set parse delimiters

Smart Parse extracts text as metadata from the file name and the file path. The metadata displays in a grid for you to access and assign to different columns. You can set the parameters for the delimiters and adjust how the metadata parses into the

columns.

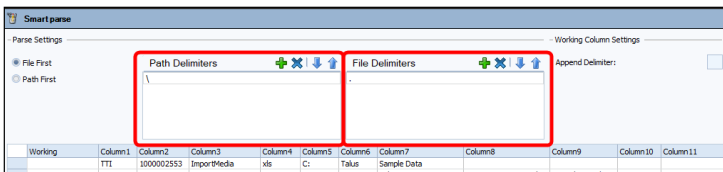
The metadata extracts from the file name and the file path. Under **Parse Settings**, select which one you want to display first (left-most) in the grid.



Determine how you want the file path and the file name to be segregated. Specify the delimiters for **Smart Parse** to use by adding them to **Path Delimiters** and **File Delimiters** fields.

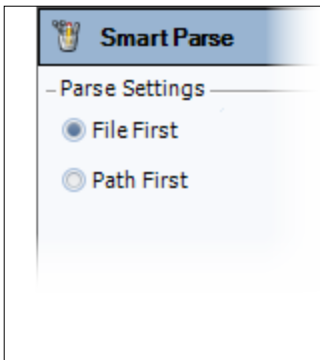
If required, enter multiple delimiters. For example, enter `.-` to parse the metadata according to periods and hyphens.

Click the arrows to adjust the order of the delimiters.



Smart Parse extracts text as metadata from the file name and the file path. The metadata displays in a grid for you to access and assign to different columns. You can set the parameters for the delimiters and adjust how the metadata parses into the columns.

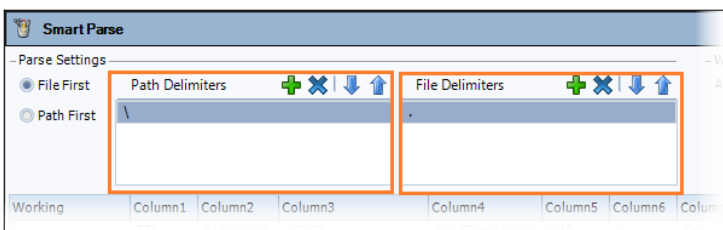
The metadata extracts from the file name and the file path. Under **Parse Settings**, select which one you want to display first (left-most) in the grid.



Determine how you want the file path and the file name to be segregated. Specify the delimiters for **Smart Parse** to use by adding them to **Path Delimiters** and **File Delimiters** fields.

If required, enter multiple delimiters. For example, enter `.-` to parse the metadata according to periods and hyphens.

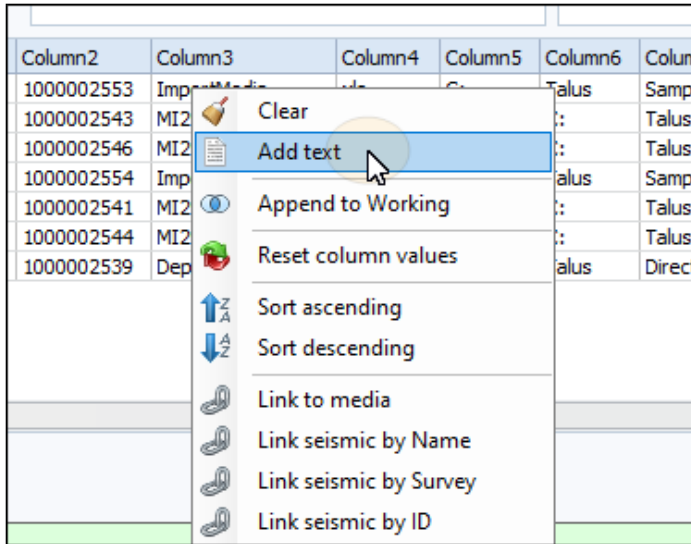
Click the arrows to adjust the order of the delimiters.



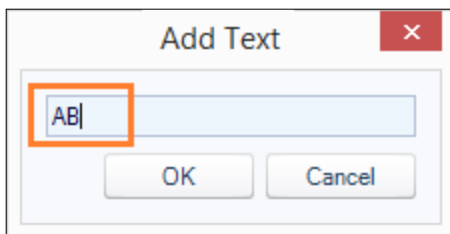
Add to column text

If the values in a column require additional text for the metadata, use the **Add Text** function.

1. Right-click on the target column to open the context menu. Click **Add Text**.



2. In the **Add Text** window, enter the text you want to add to the column text and click **OK**.



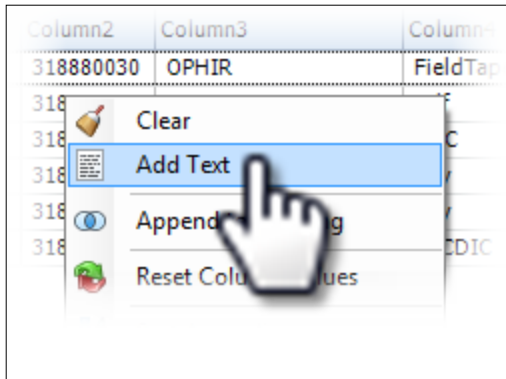
The additional text appends to the current text of all fields in the target column.

Working	Column1	Column2	Column3
	TTI	31888003AB	OPH
	TTI	31888003AB	Acqu
	TTI	31888003AB	Final
	TTI	31888003AB	Final
	TTI	31888003AB	Offs
	TTI	31888004AB	Final

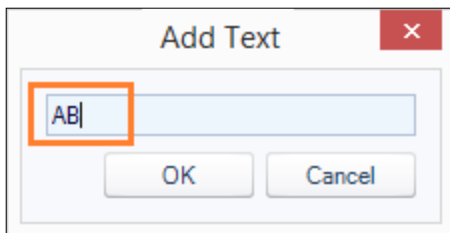
3. Click **Close** to commit the changes to the main grid.

If the values in a column require additional text for the metadata, use the **Add Text** function.

1. Right-click on the target column to open the context menu. Click **Add Text**.



2. In the **Add Text** window, enter the text you want to add to the column text and click **OK**.



The additional text appends to the current text of all fields in the target column.

Working	Column1	Column2	Column3
	TTI	31888003	AB OPHIR
	TTI	31888003	AB Acq
	TTI	31888003	AB Final
	TTI	31888003	AB Final
	TTI	31888003	AB Offs
	TTI	31888004	AB Final

3. Click **Close** to commit the changes to the main grid.

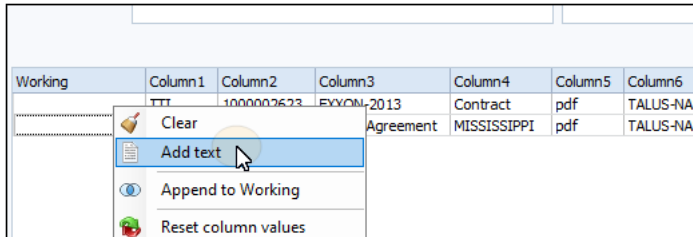
Create custom metadata

The information generated in the columns of the **Smart Parse** grid can be manipulated to produce useful metadata.

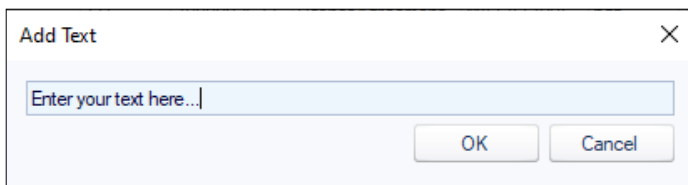
The **Working** column is for manually entering text as metadata, combining values from other columns and assigning the custom text as metadata.

To manually add text:

1. Right-click on the **Working** column then select **Add Text** from the context menu.



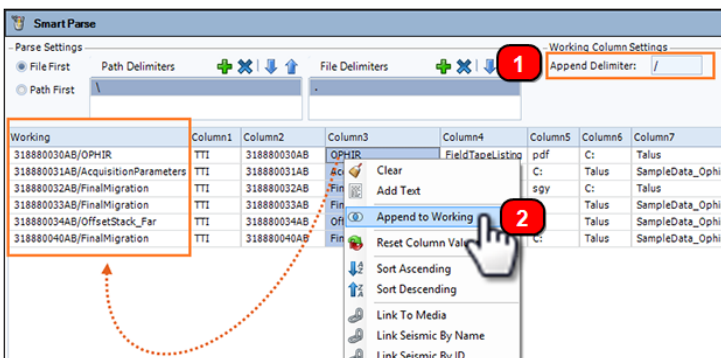
2. Enter the text



3. Click **OK**.

If the required metadata is segregated across multiple columns, combine the text into the **Working** column using the **Append to Working** function.

To use Append to Working:



1. Using a delimiter will add a dividing character between the information added to the **Working** column. To add a delimiter, enter a delimiter character in the **Append Delimiter** field.

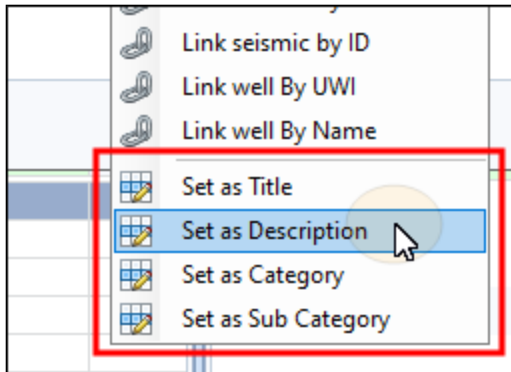
2. To add data from the grid to the **Working** column, right-click on the column with the text and select **Append to Working**. The values will populate in the **Working** column. Add as many column values as required. If you specified a delimiter, each value added will be separated by the specified character.

When the text in the **Working** column represents sufficient metadata, assign the value. See "Assign parsed metadata" on the next page.

Assign parsed metadata

To use **Smart Parse** for assigning metadata:

1. In the **Files** grid, select the rows to be parsed. Use Ctrl to select multiple rows.
2. Right-click and **Smart Parse**. The **Smart Parse** window opens with segments of the file path divided into columns.
3. Right-click on the column with the target metadata to be assigned.
4. Select the option to apply:



- » Set as Title
- » Set as Description
- » Set as Category
- » Set as Sub Category

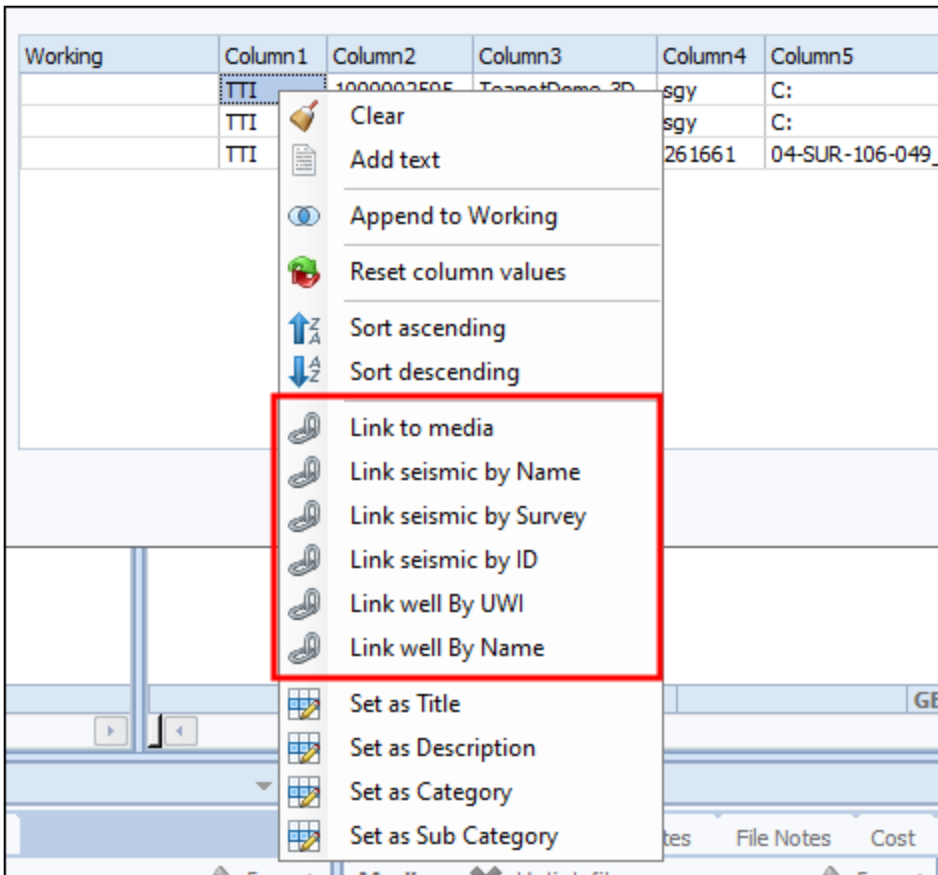
5. Click **Close** to commit the changes to the main grid.

Link files with Smart Parse

The context menu in **Smart Parse** includes actions for linking files.

To link files:

Right-click on the column and select the appropriate linking:



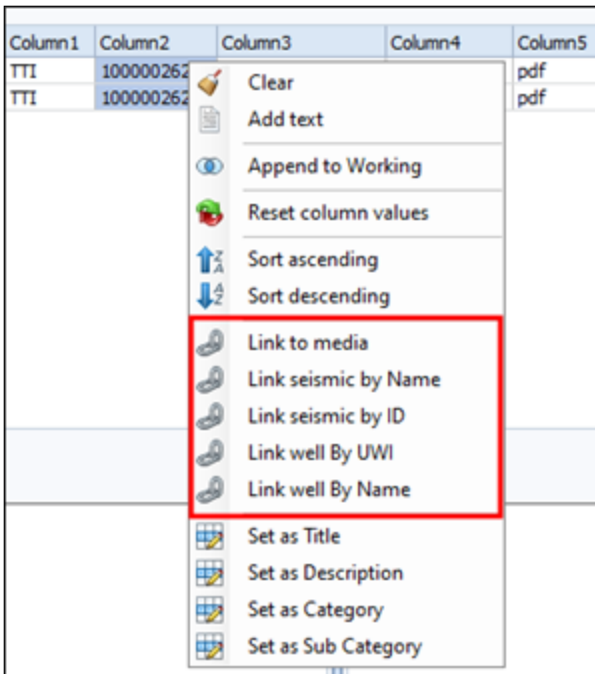
- » **Link to Media:** uses the target column as the barcode for linking to media items.
- » **Link Seismic by Name:** uses the target column as the seismic name for linking to seismic.
- » **Link seismic by Survey:** uses the file path or file name to generate links by searching by the **survey name** field.
- » **Link Seismic by ID:** uses the target column as the seismic ID for linking to seismic.
- » **Link Well by UWI:** uses the target column as the UWI for linking to Wells.
- » **Link Well by Name:** uses the target column to link to a well by name.

Click **Close** to commit the changes.

The context menu in **Smart Parse** includes actions for linking files.

To link files:

Right-click on the column and select the appropriate linking:



- » **Link to Media:** uses the target column as the barcode for linking to media items
- » **Link Seismic by Name:** uses the target column as the seismic name for linking to seismic
- » **Link Seismic by ID:** uses the target column as the seismic ID for linking to seismic
- » **Link Well by UWI:** uses the target column as the UWI for linking to Wells
- » **Link Well by Name:** uses the target column to link to a well by name

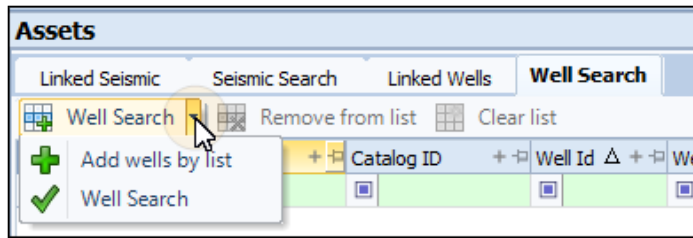
Click **Close** to commit the changes.

4.9 Link Files to Wells

The **Assets** panel of the **Catalog** module is a working space for searching and linking Wells to files in a catalog session. You can link Well to any file.

To locate the well(s) to link to a file, use the **Assets** panel:

1. In the **Wells Search** tab of the **Assets** panel, click **Well Search** and select a search category from the drop-down menu.



2. The search window opens. Enter your search criteria then click **Search**.
3. The items add to the **Well Search** grid.

Catalog Well List ID	Catalog ID	Well Id	Well Name
20.00	1000000224.00	75	SW
21.00	1000000224.00	7	100
22.00	1000000224.00	8	101
23.00	1000000224.00	9	102
24.00	1000000224.00	10	103
25.00	1000000224.00	11	104

The Catalog module offers 2 methods for linking files and wells; a drag and drop action and a context menu command.

Option 1: Use drag and drop to link files to wells

The drag and drop method is reciprocal. Dragging from the **Well Search** tab to the **Files** grid produces the same results as dragging from **Files** to **Well Search**.

1. Click to select an item from the **Well Search** tab.
2. Click and hold the Well. Drag and drop to the file in the **Files** grid.

The **Linked** columns update in each grid to show the linked icon.

Option 2: Use the context menu to link files to Well

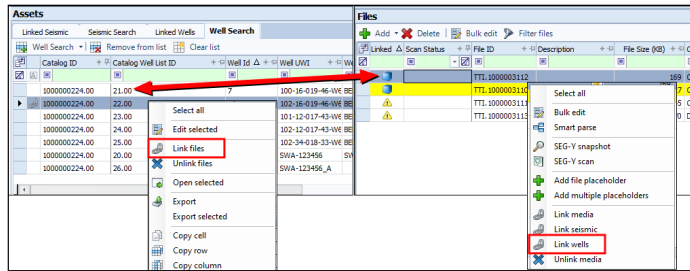
The linking action is reciprocal. The **Link files** action from the **Well Search** tab and the **Link Wells** action from the **Files** grid produce the same results.

1. Click to select the Well in the **Well Search** tab.
2. In the **Files** grid, select the item(s) associated to the Well.
3. Right-click in the **Well Search** tab to open the context menu. Select **Link files**.

The **Linked** columns update in each grid to show the linked icon.

The **Links** tab in the **Related Records** panel displays the Well linked to a file selected in the **Files**

grid.

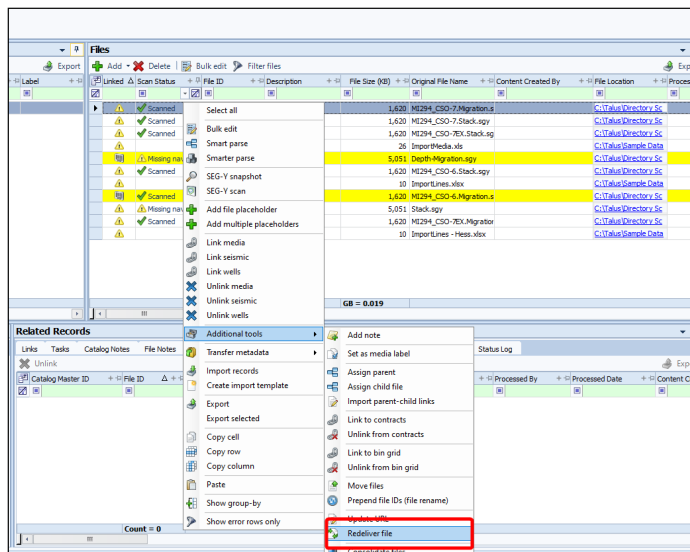


4.10 Redeliver File

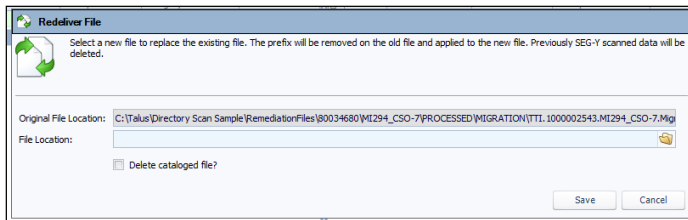
You can redeliver files to have their file location and size updated by another selected file. The File prefixes will be removed from the old file and re-applied to the new file. The tool does not allow using a file already prefixed with the current system prefix.

To redeliver a file:

1. Open a Catalog Session. In the files panel, right click and select **Additional Tools>Redeliver file** from the context menu.

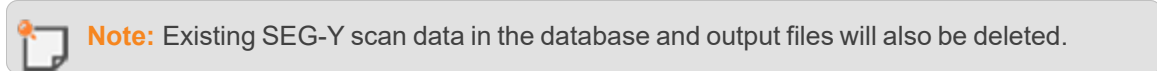


2. The **Redeliver File** dialogue panel opens.



3. Enter the path to file that is replacing the current file. You can also click the file open button and navigate to the file location.

Optionally, you can select the **Delete cataloged file?** checkbox. This will delete the current file.



4. Click **Save**. The operation will be completed.

Once complete, a log entry will be recorded in the FILE_REDELIVERY_LOG containing details of the original file and new file.

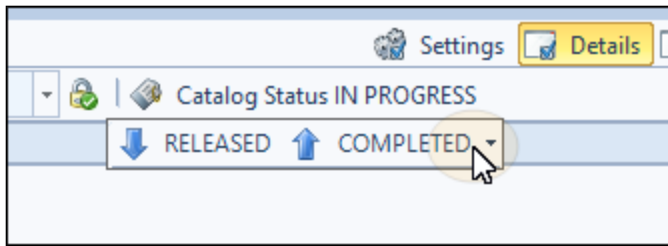


4.11 Advance to Completed status

After adding the relevant detail, files and media, your catalog session is ready to move to the **Completed** status. In the **Completed** status, the session is ready for quality control (QC) procedures.

To advance a catalog session to **Completed** status:

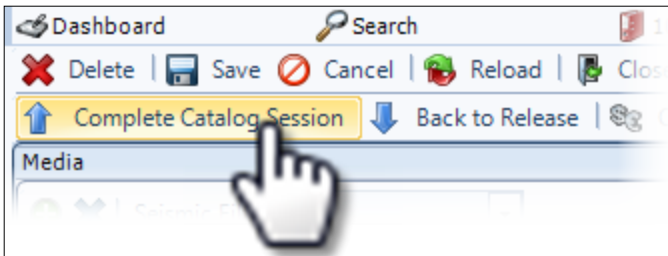
1. Open a Catalog session in **edit view**.
2. Select **Completed** from the **Catalog Status** drop down.



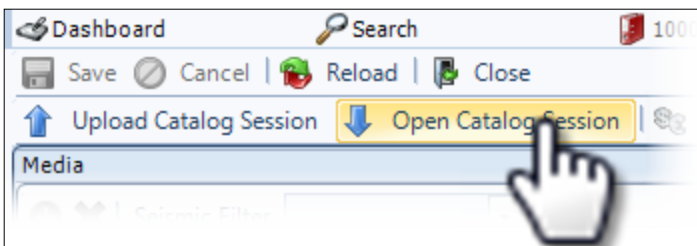
3. The system will validate the status. Errors will be displayed and the Catalog status will remain as In Progress until the errors are fixed.

After adding the relevant detail, files and media, your catalog session is ready to move to the **Completed** status. In the **Completed** status, the session is ready for quality control (QC) procedures.

To advance a catalog session to **Completed** status, click **Complete Catalog Session**.



If the session fails QC, click **Open Catalog Session**. The status changes back to **In Progress** for the person responsible to correct the data.



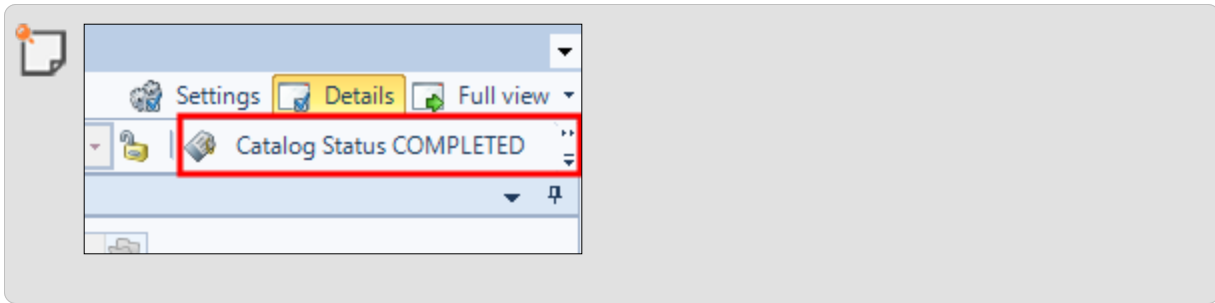
4.12 Upload a catalog session

After passing quality control (QC), the session is ready for you to upload to production. The data becomes available to users after being uploaded.



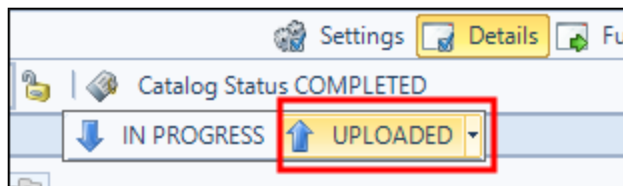
Note:

The Catalog Status needs to be set to **Completed**.



To upload to production:

1. Click the Catalog Status when **Completed**.
2. Click **Uploaded**.

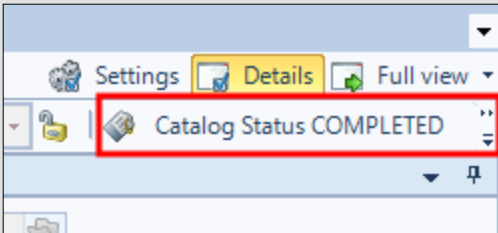


3. The status changes to **Uploaded**.

The files in an **Uploaded** catalog session are available for moving to Production. Refer to "Move files to production" on the next page.

After passing quality control (QC), the session is ready for you to upload to production. The data becomes available to users after being uploaded.

 **Note:**
The Catalog Status needs to be set to **Completed**.

A screenshot of the software interface showing the 'Catalog Status COMPLETED' window. The window has a title bar with 'Settings', 'Details', and 'Full view' tabs. The main content area displays 'Catalog Status COMPLETED' with a red box highlighting the text. There are also some icons and a small 'Full view' button in the top right corner.

To upload to production:

1. Click the Catalog Status when **Completed**.
2. Click **Uploaded**.



3. The status changes to **Uploaded**.

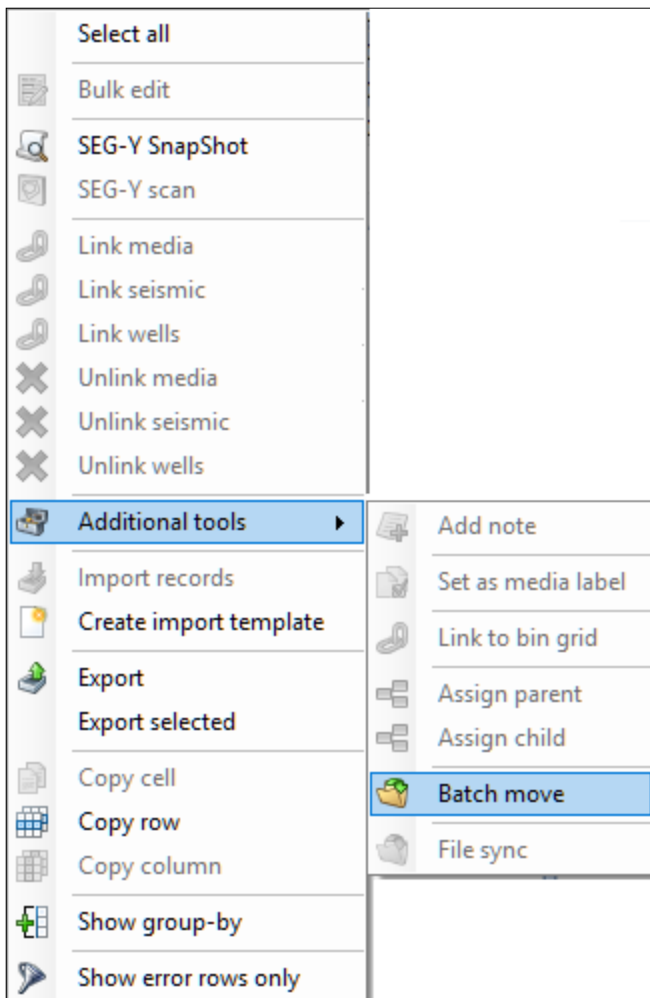
The files in an **Uploaded** catalog session are available for moving to Production. Refer to "Move files to production" below.

4.13 Move files to production

To move files to production, use the **Batch Move** tool.

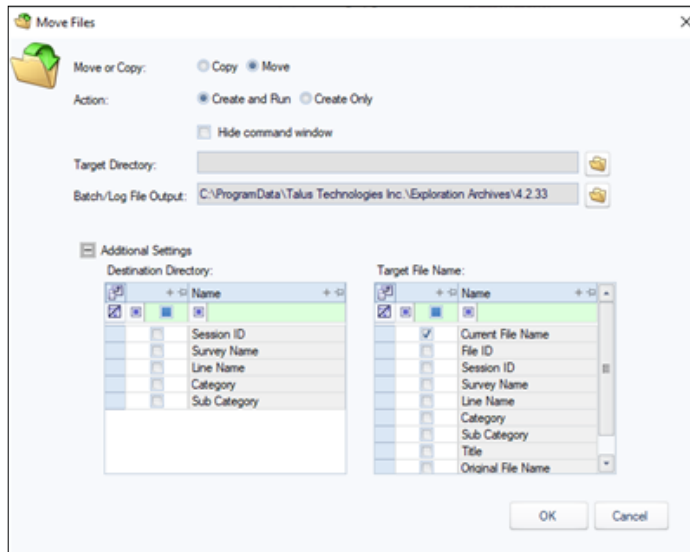
Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:



- » **Move or Copy:** Select **Move**.
- » **Action:** Select **Create and Run**.
- » **Target Directory:** Browse to and select the appropriate production location.
- » **Batch/Log File Output:** Browse to and select the appropriate output location.
- » **Additional Settings:** Select the **Destination Directory** and the category to use for the **Target File Name**.

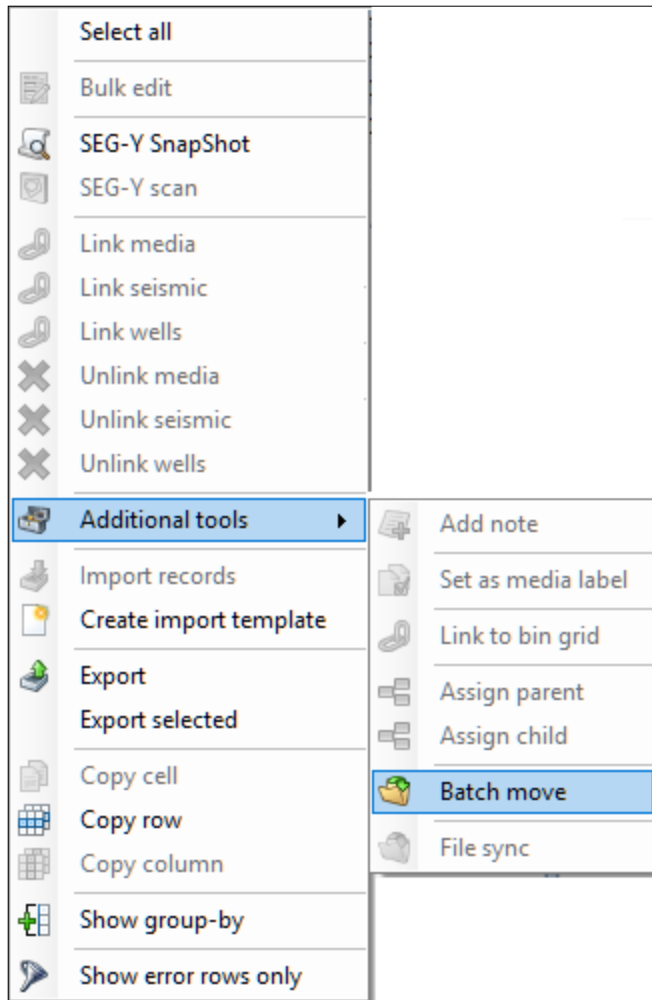
4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

New in this version:

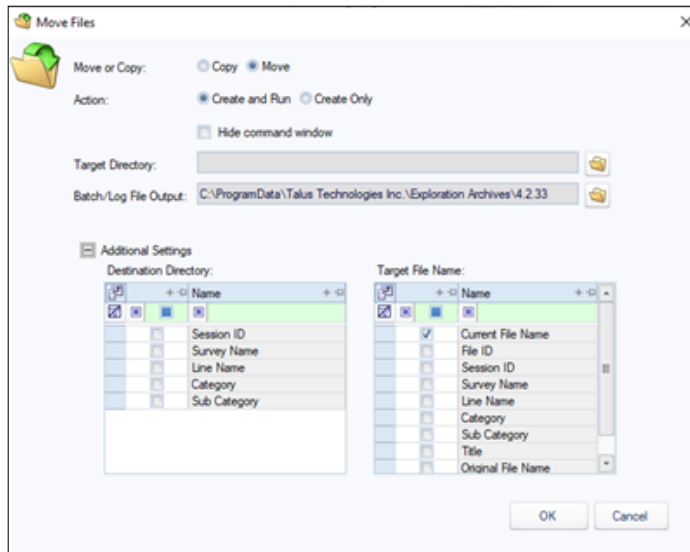
- » The target file name will default to **Current File Name**.
- » Now allows a folder structure with **SeismicName_SeismicID**.
- » You can now create a directory listing as part of the copy process.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:

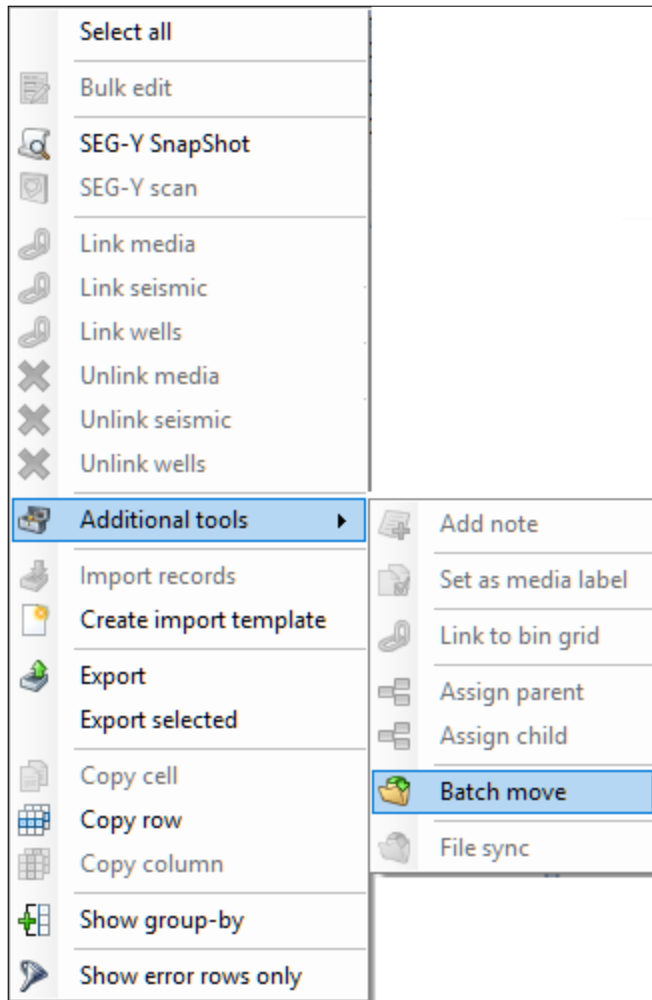


- » **Move or Copy:** Select **Move**.
- » **Action:** Select **Create and Run**.
- » **Target Directory:** Browse to and select the appropriate production location.
- » **Batch/Log File Output:** Browse to and select the appropriate output location.
- » **Additional Settings:** Select the **Destination Directory** and the category to use for the **Target File Name**.

4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

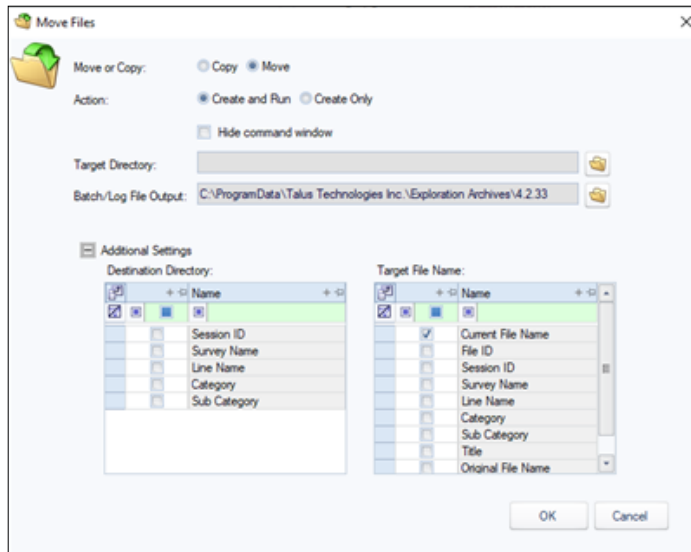
To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:

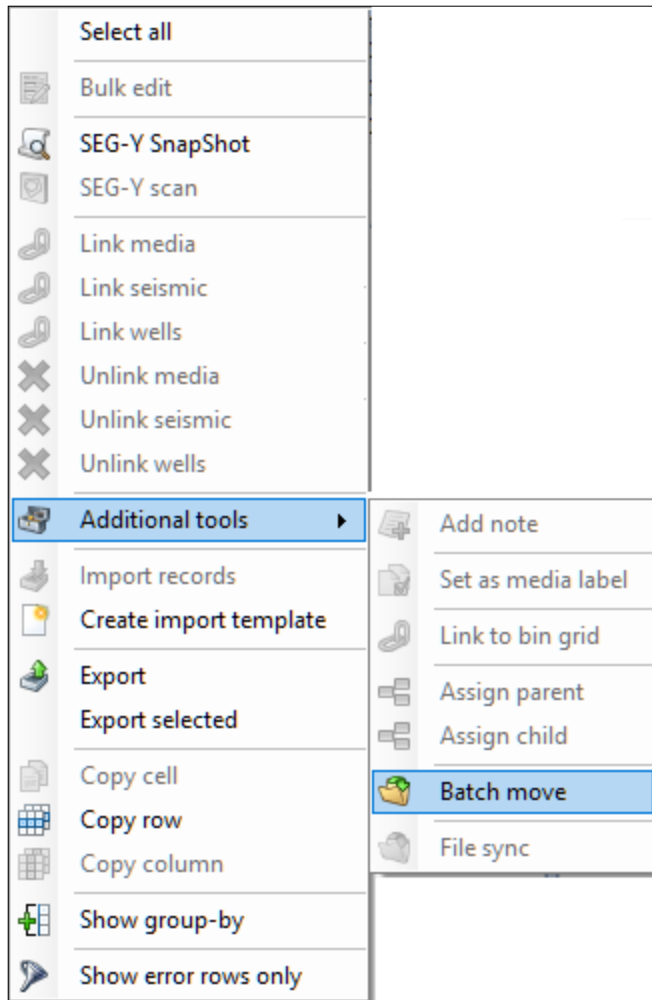


- » **Move or Copy:** Select **Move**.
- » **Action:** Select **Create and Run**.
- » **Target Directory:** Browse to and select the appropriate production location.
- » **Batch/Log File Output:** Browse to and select the appropriate output location.
- » **Additional Settings:** Select the **Destination Directory** and the category to use for the **Target File Name**.

4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

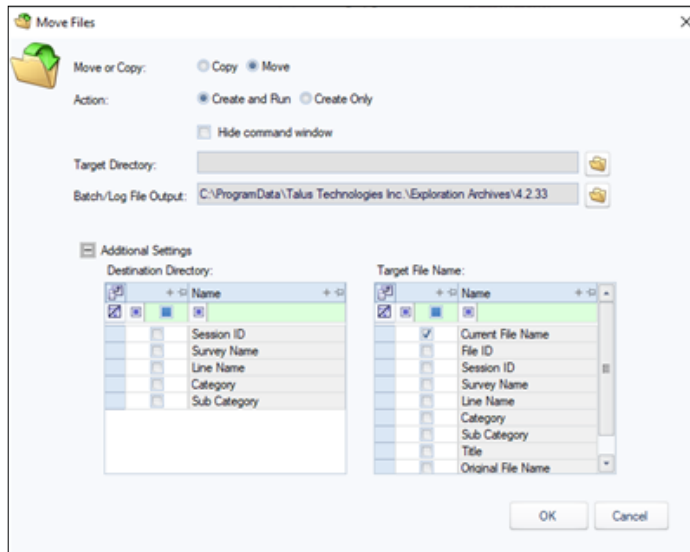
To move files to production, use the **Batch Move** tool. Open the **Uploaded** catalog session and find the files to be moved in the **Files** grid.

1. Click to select the files to be moved.
2. Right-click to open the context menu and point to **Additional Tools>Batch Move**.



The **Move Files** window opens.

3. In the **Move Files** window, set the following criteria:



- » **Move or Copy:** Select **Move**.
- » **Action:** Select **Create and Run**.
- » **Target Directory:** Browse to and select the appropriate production location.
- » **Batch/Log File Output:** Browse to and select the appropriate output location.
- » **Additional Settings:** Select the **Destination Directory** and the category to use for the **Target File Name**.

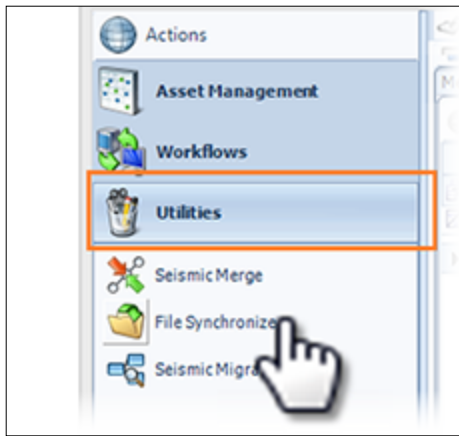
4. Click **OK**. The files move to the specified folder.
5. Open the originating folder (or staging folder) to verify that the files moved correctly.

Synchronize files

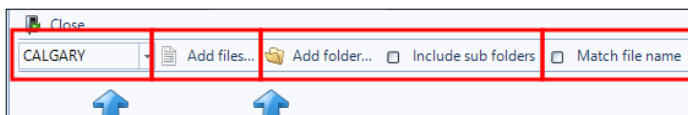
After moving files to a production folder, the new file location must be synchronized with Exploration Archives.

To synchronize (sync) the files:

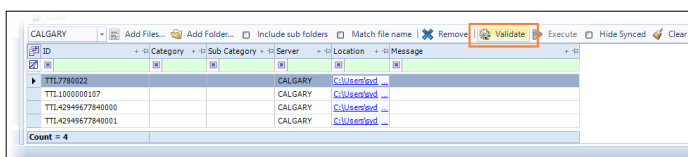
1. In the navigation panel, under **Utilities**, click **File Synchronize**.
The **File Synchronize** module opens in the workspace panel.



2. In the drop-down option, select the server that you want to add files or folders from. In the sample image, the server CALGARY is selected.



3. Add files:
 - » To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.
 - » To add all files within a folder select **Add Folder**.
 - » To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.
 - » **Match file name** checks that the file names are the same.
4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



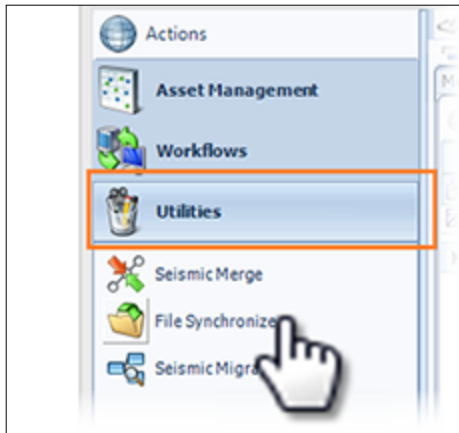
5. Check the **Message** column for errors and correct all errors before proceeding.
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

To filter the files remaining to be synced only, click the **Hide Synced** button.

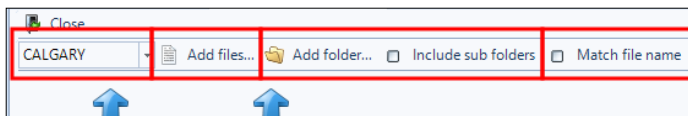
After moving files to a production folder, the new file location must be synchronized with Exploration Archives.

To synchronize (sync) the files:

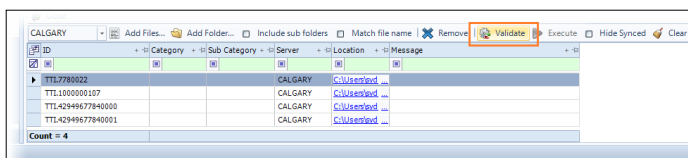
1. In the navigation panel, under **Utilities**, click **File Synchronize**.
The **File Synchronize** module opens in the workspace panel.



2. In the drop-down option, select the server that you want to add files or folders from. In the sample image, the server CALGARY is selected.



3. Add files:
 - » To add individual files, click **Add Files**. Browse to the file location and select the files. Hold Ctrl to select multiple files.
 - » To add all files within a folder select **Add Folder**.
 - » To include the sub folders, select **Include sub folders** and then click **Add Folder**. Navigate to the folder and select to add. A grid populates in the workspace with the specified files listed.
 - » **Match file name** checks that the file names are the same.
4. Click **Validate** to verify that the specified files exist in the Exploration Archives production tables.



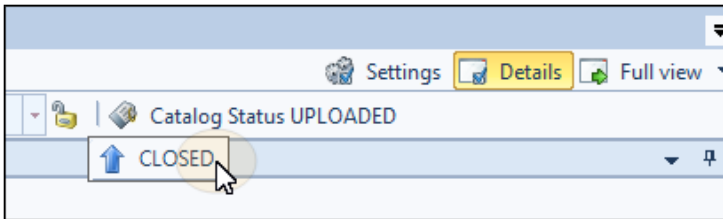
5. Check the **Message** column for errors and correct all errors before proceeding.
6. The **Execute** button becomes available when no errors exist. Click **Execute** to complete the process.

To filter the files remaining to be synced only, click the **Hide Synced** button.

4.14 Close a catalog session

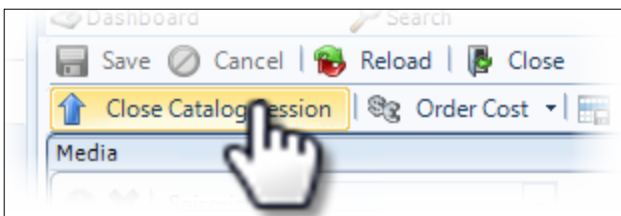
The catalog session is ready to be closed after the spinning disk files are moved and synchronized, and all other media have been sent to hierarchical storage management (SM).

To close a catalog session ,select CLOSED from the **Catalog Status** .



The catalog session is ready to be closed after the spinning disk files are moved and synchronized, and all other media have been sent to hierarchical storage management (SM).

To close a catalog session, click **Close Catalog Session**.



5.0 Data Request

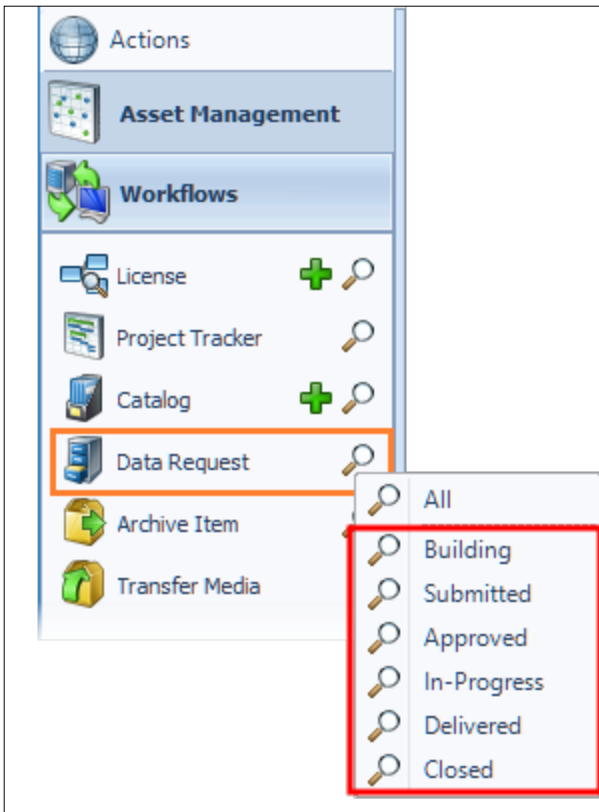
The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

With a variety of features and customizable fields, you can easily modify the procedures you perform to best suit your company's workflow.

Typically, completing a request for data includes activities to be performed outside of Exploration Archives. The **Data Request** module provides the following statuses to manage the stages of your workflow:

- » **Building:** Information is being entered and products are being added to the request.
- » **Submitted:** Information is complete and the request has been submitted for approval.
- » **Approved:** Information has been reviewed and the request has been approved.
- » **In-progress:** The requested products are being compiled and are in transit for delivery.
- » **Delivered:** The requested products have been delivered to the destination.
- » **Closed:** Confirmation has been received that the products arrived at the destination.

The statuses are also configured as predefined searches. To locate a data request of a particular status, use the search function next to **Data Request** in the navigation panel under **Workflows**.



The search results will appear in the **Data Request Properties** grid.

The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

New in this version:

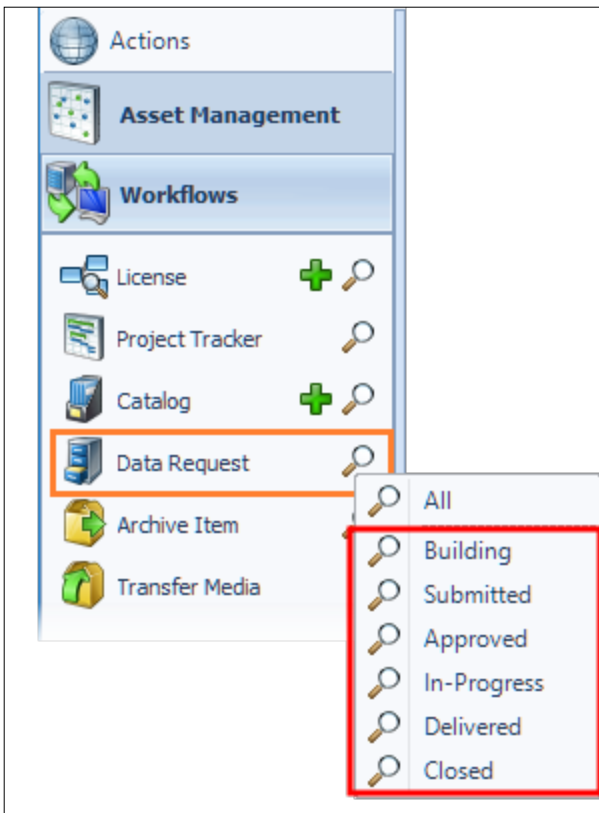
- » Created a new summary screen such that a user can search for one or many Data Requests, and view all details without having to open an individual Data Request in Edit Mode.
- » Added the ability to add staging files and media to a Data Request. This is helpful for cases where files or media may need to be sent to a third party prior to being uploaded to production.
- » Added a **SEG-Y** Status column to the products grid.
- » Added a **SEG-Y** Snapshot” menu option to products grid.
- » Added multiple **Open selected** menu options to the products grid to allow opening of selected files and media in both production and staging.

With a variety of features and customizable fields, you can easily modify the procedures you perform to best suit your company's workflow.

Typically, completing a request for data includes activities to be performed outside of Exploration Archives. The **Data Request** module provides the following statuses to manage the stages of your workflow:

- » **Building**: Information is being entered and products are being added to the request.
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The statuses are also configured as predefined searches. To locate a data request of a particular status, use the search function next to **Data Request** in the navigation panel under **Workflows**.

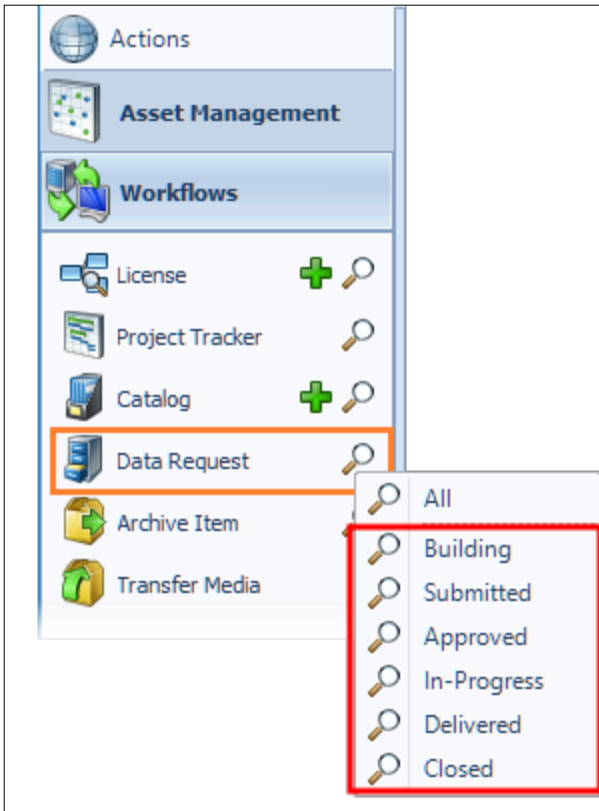


The search results will appear in the **Data Request Properties** grid.

The **Data Request** module in Exploration Archives Desktop is used for ordering products and tracking the movement of your data.

With a variety of features and customizable fields, you can easily modify the procedures you perform to best suit your company's workflow.

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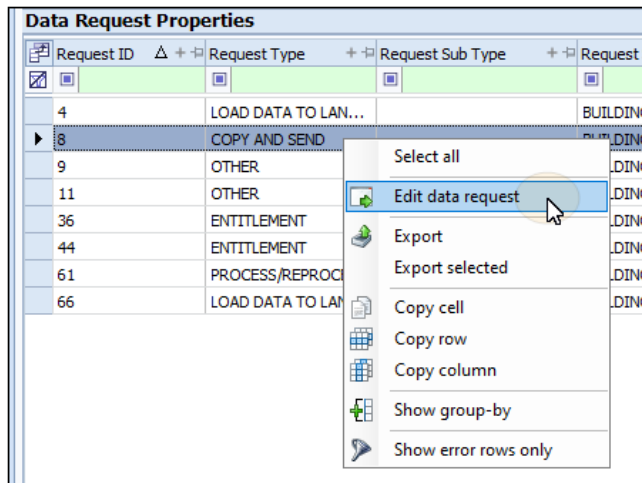
The statuses are also configured as predefined searches To locate a data request of a particular status, use the search function next to **Data Request** in the navigation panel under **Workflows**.

5.1 Edit an existing Data Request

Data requests can be updated or edited during the process.

To edit a Data Request:

1. Open a Data Request by using either the following methods:
 - » Highlight a Data request, then select **edit data request** from the context menu.



- » Highlight then double-click the data request to open it in a new tab.

The Data request opens under a new tab.

The screenshot shows the 'Data Request Properties' form for Request ID 36. The form is divided into two main sections: 'Details' and 'Request Information'. The 'Details' section includes fields for Request ID, Request Type, Request Sub Type, Catalog, Vendor, Priority, and Department. The 'Request Information' section includes fields for Request Status, Requested By, Requested Date, Assignee, Order Date, Internal Order Ref, License ID, Cost Group, and Project.

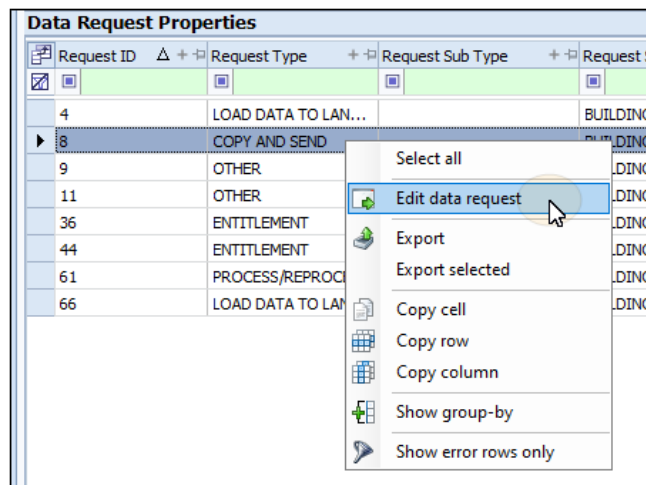
Details		Request Information	
Request ID	36	Request Status	BUILDING
Request Type	ENTITLEMENT	Requested By	
Request Sub Type		Requested Date	11-May-2017
Catalog		Assignee	
Vendor		Order Date	
Priority		Internal Order Ref	
Department		License ID	7-SHELL-EU-765-000
		Cost Group	
		Project	

2. Make your edits to the relevant fields.
3. When finished, click **Save** on the toolbar.

Data requests can be updated or edited during the process.

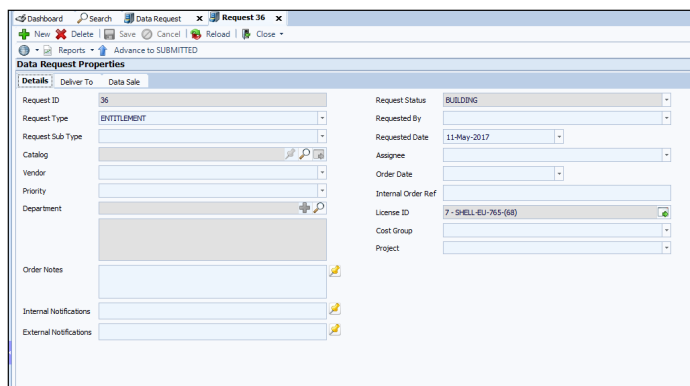
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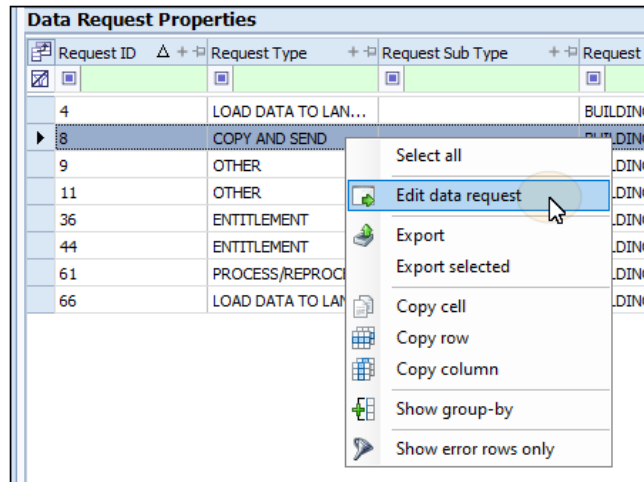


2. Make your edits to the relevant fields.
3. When finished, click **Save** on the toolbar.

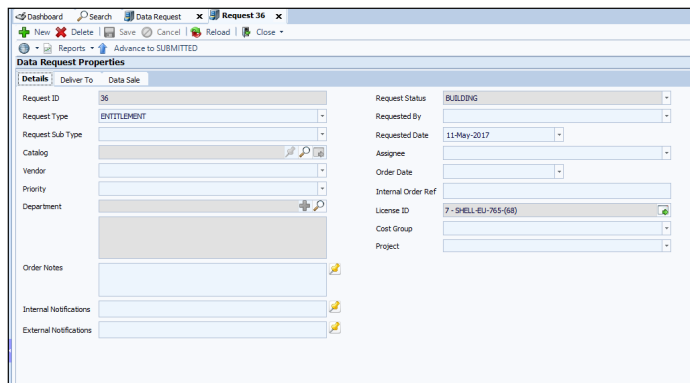
Data requests can be updated or edited during the process.

To edit a Data Request:

1. Open a Data Request by using either the following methods:
 - » Highlight a Data request, then select **edit data request** from the context menu.



The Data request opens under a new tab.



2. Make your edits to the relevant fields.
3. When finished, click **Save** on the toolbar.

5.2 Build a Data Request

To build a data request:

1. In the toolbar, select **New** with an auto-generated **Request ID**.

If you have items for order in your **Cart**, you can create a new data request directly from the **Cart**.

A new data request starts in the *Building* status and is ready for you to enter information and add products.

The main area of the workspace is divided into 3 sections for entering information:

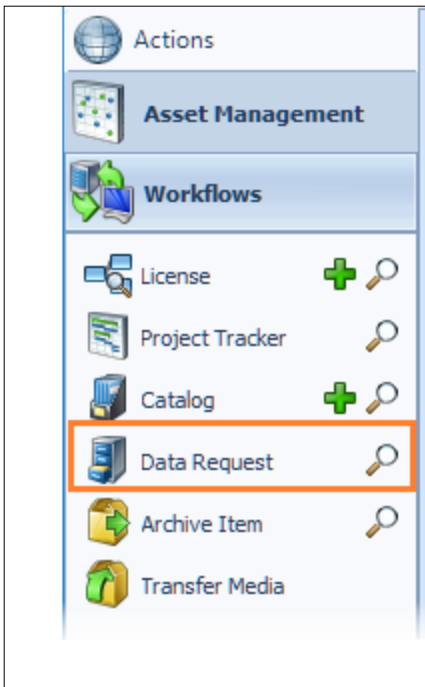
**Note:**

Each section can be expanded or collapsed to save screen space.

- » **Details:** General details and logistics
- » **Deliver To:** Delivery details including destination and checkout information
- » **Data Sale:** Sales and licensing information

The lower panel of the workspace includes tabs for adding products, adding and viewing associated information, and accessing historical details.

To build a data request, open a new data request from the **Data Request** module. In the navigation panel, under **Workflows**, click **Data Request**.



The **Data Request** module opens in the workspace with an auto-generated **Request ID**.

If you have items for order in your **Cart**, you can create a new data request directly from the **Cart**.

A new data request starts in the *Building* status and is ready for you to enter information and add products.

The main area of the workspace is divided into 3 sections for entering information:



Note:

Each section can be expanded or collapsed to save screen space.

The screenshot shows the 'Request 12' form. The 'Details' section is highlighted with a red box. It contains the following fields:

- Request ID: 12
- Request Type: LOAD DATA
- Request Sub Type: (empty)
- Catalog: (empty)
- Vendor: (empty)
- Priority: NORMAL
- Department: TALUS TECHNOLOGIES INC. (with contact info: DAVID MORRISON, Address: 403-283-8559)
- Request Status: BUILDING
- Requested By: David Morrison
- Requested Date: 19-Apr-2017
- Assignee: (empty)
- Order Date: (empty)
- Internal Order Ref: (empty)
- License ID: (empty)
- Cost Group: (empty)
- Project: (empty)

Below the Details section are the 'Deliver To' and 'Data Sale' sections, also highlighted with red boxes.

- » **Details:** General details and logistics
- » **Deliver To:** Delivery details including destination and checkout information
- » **Data Sale:** Sales and licensing information

The lower panel of the workspace includes tabs for adding products, adding and viewing associated information, and accessing historical details.

The screenshot shows the 'Products' tab in the lower panel. It contains a table with the following columns:

- Availability
- Circulation Status
- Title
- File Description
- File Category
- File Sub Category
- Current Store
- Current Store Location
- Current Store

The table is currently empty.

Enter information

The information areas of a data request include:

- » **Details:** General details and logistics of the data request
- » **Deliver To:** Delivery details including destination and checkout information
- » **Data Sale:** Sales and licensing information

Entering Details information

In the **Details** section of the **Data Request** module, enter the relevant information.



Note:

The **Request ID** and **Request Status** are auto-generated and **cannot** be edited.

The screenshot shows the 'Request 12' form with the 'Details' tab selected. The form includes the following fields:

- Request ID:** 12
- Request Status:** BUILDING
- Request Type:** COPY AND SEND
- Requested By:** David M
- Request Sub Type:** (empty)
- Requested Date:** 19-Apr-2017
- Catalog:** (empty)
- Assignee:** (empty)
- Vendor:** (empty)
- Order Date:** (empty)
- Priority:** NORMAL
- Internal Order Ref:** (empty)
- Department:** OVATIONDATA (UK)
- License ID:** (empty)
- Cost Group:** (empty)
- Project:** (empty)
- Order Notes:** (empty)
- Internal Notifications:** (empty)
- External Notifications:** (empty)
- Deliver To:** (empty)
- Data Sale:** (empty)

Most of the fields require pre-defined detail that is available in the drop-down options for each field. Select each option as appropriate.

In the **Department** field, the drop-down opens a grid with your business associate library. Locate the department and click to select. The department name and contact information populate in the associated fields.

If your business contact is not available in the **Department** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

Be sure to enter detail for the fields that are required by your company procedures.

When complete, click **Save**.

Entering Deliver To information

In the **Deliver To** section of the **Data Request** module, enter the relevant information and add notes if required.

If your business contact is not available in the **Deliver To** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

When complete, click **Save**.

Entering Data Sale information

The **Data Sale** section is available to use for a data request that is a sales transaction.

Enter the relevant information and click **Save**.

If your business contact is not available in the **Sold To** or the **Broker** dropdowns, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

The information areas of a data request are divided into 3 tabs:

- » **Details:** General details and logistics of the data request
- » **Deliver To:** Delivery details including destination and checkout information
- » **Data Sale:** Sales and licensing information

Entering Details information

In the **Details** section of the **Data Request** module, enter the relevant information.



Note:

The **Request ID** and **Business ID** are auto-generated and **cannot** be edited.

Dashboard Search Data Request x Request 162480024 x
New Delete Save Cancel Reload Close
Reports Advance to SUBMITTED

Data Request Properties

Details Deliver To Data Sale

Request ID: 162480024 Request Status: BUILDING
Business ID: 162480024 Requested By:
Request Type: REQUEST FOR DATA Requested Date: 03-Sep-2021
Request Sub Type: Assignee:
Catalog: 147130705 2D-136_AGS095 Order Date:
Vendor: Internal Order Ref:
Priority: License ID:
Department: ADNOC Cost Group:
ADNOC Project:
Order Notes:
Internal Notifications:
External Notifications:

Most of the fields require pre-defined detail that is available in the drop-down options for each field. Select each option as appropriate.

In the **Department** field, the drop-down opens a grid with your business associate library. Locate the department and click to select. The department name and contact information populate in the associated fields.

If your business contact is not available in the **Department** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

Be sure to enter detail for the fields that are required by your company procedures.

When complete, click **Save**.

Entering Deliver To information

In the **Deliver To** section of the **Data Request** module, enter the relevant information and add notes if required.

Dashboard Search Data Request x Request 162480024 x
New Delete Save Cancel Reload Close
Reports Advance to SUBMITTED

Data Request Properties

Details Deliver To Data Sale

Address Info: ADAP
Delivery Media Type: USB
Digital Delivery: FTP
Courier:
Tracking Number:
Delivery Notes:
Checkout Store: ZI 005
Checkout Location:
Return Date: 15-Oct-2021
Completed Date:

If your business contact is not available in the **Deliver To** drop-down, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

When complete, click **Save**.

Entering Data Sale information

The **Data Sale** section is available to use for a data request that is a sales transaction.

Enter the relevant information and click **Save**.

Dashboard Search Data Request Request 162480024

New Delete Save Cancel Reload Close

Reports Advance to SUBMITTED

Data Request Properties

Details Deliver To **Data Sale**

Sold To [Dropdown with + icon] [Text Area]

Broker [Dropdown with + icon] [Text Area]

Blocks [Dropdown]

Sale Date [Dropdown]

Sale Details [Text Area]

Salesperson [Dropdown]

License Type [Dropdown]

Coverage CRS [Dropdown]

Client Reference [Text Area]

Client AFE [Text Area]

Billing Info [Text Area]

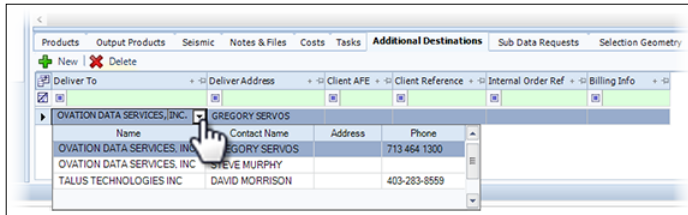
If your business contact is not available in the **Sold To** or the **Broker** dropdowns, you can add a new business associate. Click **add** and the **Business Associate** tab will open for you to enter the information.

Add additional destinations

The lower area of the workspace includes a tab for adding additional delivery destinations.

To add an additional destination:

1. Click the **Additional Destinations** tab.
2. Click **New**.
3. Click the down arrow in the **Deliver To** column to access the available destinations.

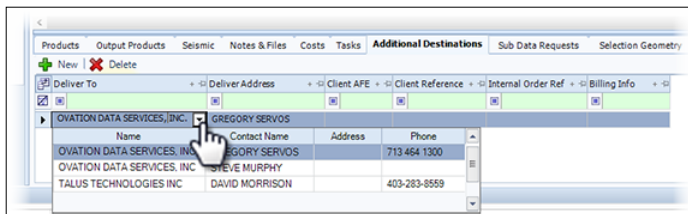


4. Select the target destination and the information adds to the grid.
5. Click **Save**.

The lower area of the workspace includes a tab for adding additional delivery destinations.

To add an additional destination:

1. Click the **Additional Destinations** tab.
2. Click **New**.
3. Click the down arrow in the **Deliver To** column to access the available destinations.



4. Select the target destination and the information adds to the grid.
5. Click **Save**.

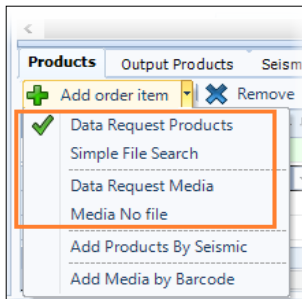
Adding products

The lower panel of the workspace contains tabs for adding products, adding and viewing associated information, and accessing historical details.

In the **Products** tab of the **Data Request**, you can add products using the **Add Order Item** feature. This feature offers a variety of options for adding a product to a **Data Request** that is displayed in the workspace.

To search for and add products:

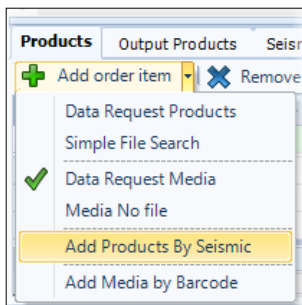
1. Click the down arrow of **Add Order Item** and select one of the configured search options.



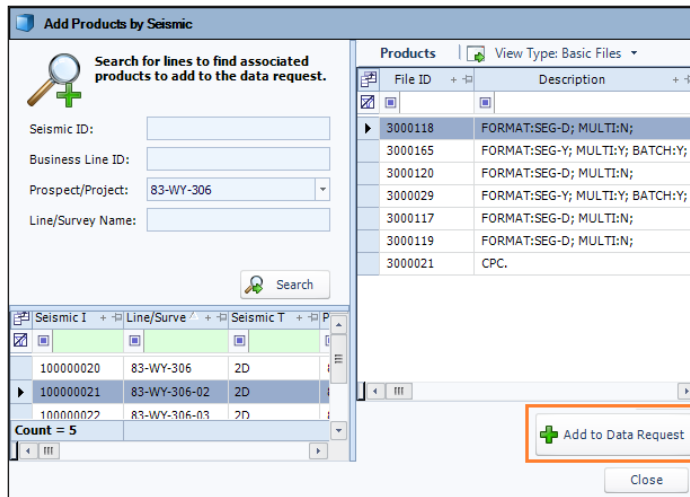
2. In the search results window, select the item to add to the **Data Request**. Hold Ctrl and click to select multiple items.
3. Click **OK**. The item(s) display in the **Products** tab grid.
4. Click **Save**.

To add products associated to a particular seismic:

1. Click the down arrow of **Add Order Item** and select **Add Products by Seismic**.

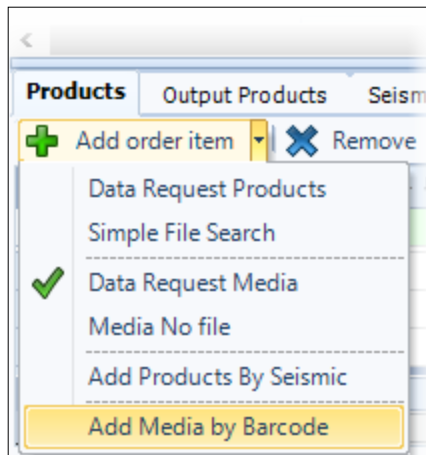


2. In the new window, enter or select search criteria and click **Search**.
3. Select an item in the search results in the lower left panel. The associated **Products** of the selected item will display in the right panel.
4. Select the products to add to the **Data Request** and click **Add to Data Request**.

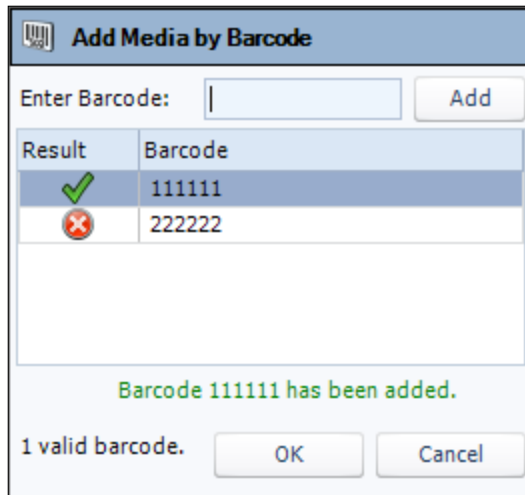


To add physical media items using barcode scanning:

1. Click the down arrow of **Add Order Item** and select **Add Media by Barcode**.



2. The **Add Media by Barcode** window opens. Use a scanner to scan the items to be added.
3. As items are scanned, valid barcodes are indicated with a green check. Invalid barcodes display a red x.



Add Media by Barcode

Enter Barcode:

Result	Barcode
✓	111111
✗	222222

Barcode 111111 has been added.

1 valid barcode.

- When complete, click **OK** to add the items to the **Products** tab grid.
Invalid items will be omitted.

Using the Cart

The **Cart** is a temporary working space for you to collect items to add to a data request.

You can add seismic, files or media to the **Cart** from a search window or from the **Seismic**, **File** or **Media** modules.

After adding items to your **Cart**, you can add them to an existing data request or use the collection to start a new data request.

The **Cart** appears at the top of the navigation panel and remains accessible while you navigate to different areas of the software.

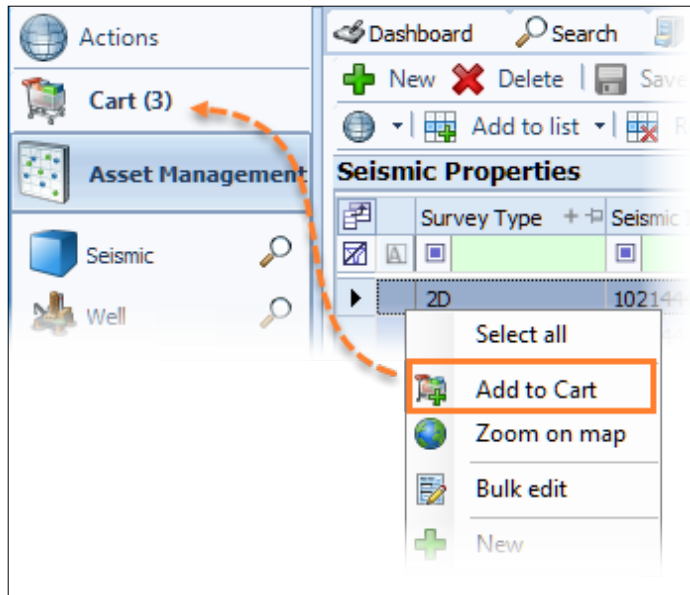


Note:

If you add items from the **Related Records** of a module, the parent items of the selected record will add to the cart as well. However, when adding items from the main grid of a module, only the selected items from the main grid add to the cart.

To add items to the **Cart**:

- Click to select items from a grid in the **Seismic**, **File** or **Media** module, or from a search results grid.
- Right-click to open the context menu and select **Add to Cart**.



The items that are products will add to your cart.



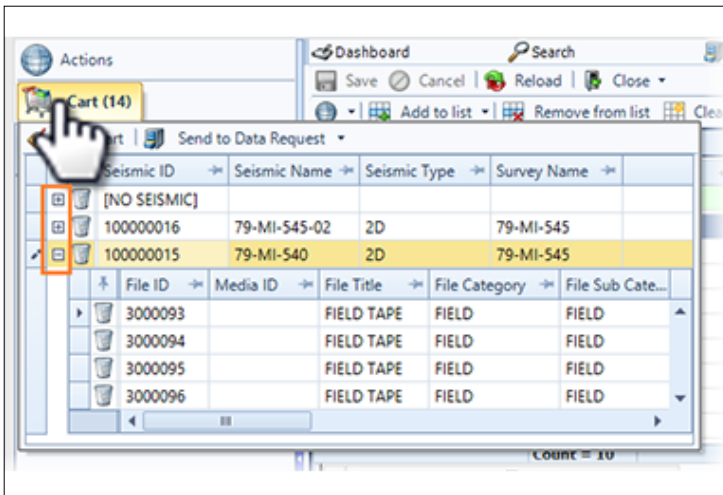
Note:

The **Cart** doesn't appear until you add at least one item.

Reviewing items in the Cart

The **Cart** is a working space for you to collect items to add to a **Data Request**.

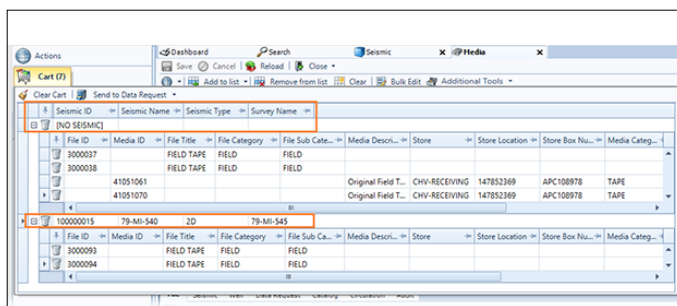
To review the items in your cart, click **Cart** at the top of the navigation panel.



The **Cart** window displays items in a grid that has expanding rows.

The initial view displays the seismic detail in the rows. If your **Cart** has files and media that is not linked to seismic, the initial row displays [NO SEISMIC].

- » Click the expand button to display the file and media information for you to review.
- » To remove individual items from your **Cart**, click trash in the row.
- » To remove all items from your **Cart**, click **Clear Cart**

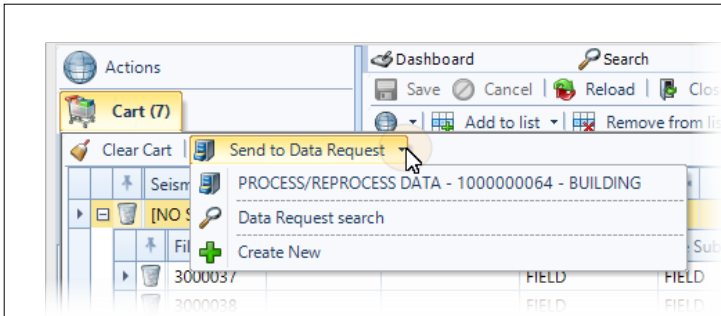


Transferring Cart items

The items in the Cart are available for adding to a data request.

To send, or transfer items to a data request, click the down arrow on the **Send to Data Request** button.

The items appearing in the menu include:



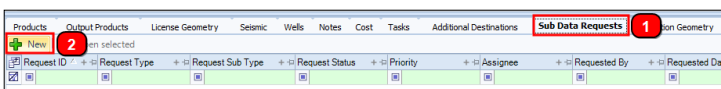
- » Data requests that are currently open display as a list at the top of the menu.
Click on an Open Data Request to send items to a request that is currently open in the workspace.
- » Click **Data Request search** to open a search to locate a data request and send the items to a specified request.
- » Click **Create New** to create a new data request with the items in your **Cart**. Selecting **Create New** opens a new data request in the *Building* status.

After clicking to select the destination for your cart items, the items automatically transfer to the grid in the **Products** tab of the data request.

Creating a sub data request

The **Sub Data Request** accommodates requests for data that you are distributing to multiple locations. The **Sub Data Request** populates the information from the main request, making it available for you to filter out the detail that is not applicable.

To create a **Sub Data Request**:



1. In the lower area of the workspace, click the **Sub Data Request** tab.
2. Click **New**.

The **Create New Sub Data Request** window opens.

Create Sub Data Request

Select the Request Type and Sub Type. Select the General Information and the Tabs to include in the new data request. To exclude items listed in any of the tabs, deselect them from the tabbed display.

3 New Details
Request Type: **COPY AND SEND** Request Sub Type:

4 Copy General Information
☒ Details ☐ Deliver To ☐ Data Sale

5 Copy Tabs
☒ Products ☒ Output Products ☒ Seismic ☐ Notes & Files
☐ Costs ☒ Tasks ☒ Additional Destinations ☐ Selection Geometry

6 Products Output Products Seismic Notes & Files Costs Tasks Additional Destinations Selection Geometry

Select	Availability	File ID	Media ID	Status	File Title	File Description	File Category
☒	ONLINE - CALGARY	3112167			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
☒	ONLINE - CALGARY	3111429			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
☒	ONLINE - CALGARY	3112181			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
☐	ONLINE - CALGARY	3112182			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
☐	ONLINE - CALGARY	3110680			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
☐	ONLINE - CALGARY	3110681			FILTERED FINAL STACK	FORMAT SEG-Y...	PROCES
Count = 15							

Save Cancel

3. In the **New Details** section, select the **Request Type** and **Request Sub Type**.
4. In the **Copy General Information** section, select the areas from the main request to copy. The information will copy to your **Sub Data Request** and will be available to edit further if needed.
5. In the **Copy Tabs** section, select the checkbox next to the tab titles that you want to copy to your **Sub Data Request**. Selecting a tab includes all the detail from that tab.
6. Use the tabs displayed in the lower panel and the checkboxes in the **Select** column to specify the rows to copy. Alternatively, click **Unselect All** and select the particular items to include. Click through each tab and select or deselect the rows for your **Sub Data Request**.
7. Click **Save**. The selected information copies to the sub data request and opens in a new module tab. Point to the tab title and a pop-up opens with the sub request details.

Dashboard Search 1000000040 1000000081

New X Delete | Save Cancel Reload Close

Reports Advance to APPRO

Details

Request ID: 1000000081 Request Status: SUBMITTED

Request Type: COPY AND SEND Requested By:

Sub data request opens in new tab.

Sub Request ID: 1000000081
Request Type: COPY AND SEND
Request Status: SUBMITTED

5.3 Submit a data request

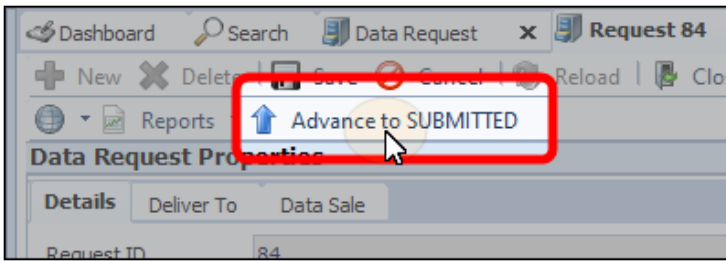
Advancing a data request to *Submitted* status will make it available for the designated person to review and approve.



Warning:

Before advancing a data request to *Submitted* status, ensure that all the information is correct and that all the requested products have been added.

To advance your data request to *Submitted* status, click **Advance to SUBMITTED**.



Note:

Orders submitted via Exploration Archives Browser automatically display with a *Submitted* status.

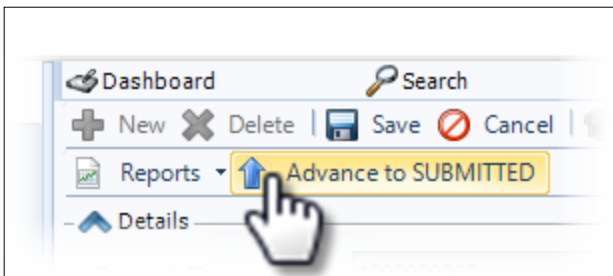
Advancing a data request to *Submitted* status will make it available for the designated person to review and approve.



Warning:

Before advancing a data request to *Submitted* status, ensure that all the information is correct and that all the requested products have been added.

To advance your data request to *Submitted* status, click **Advance to SUBMITTED**.



Note:

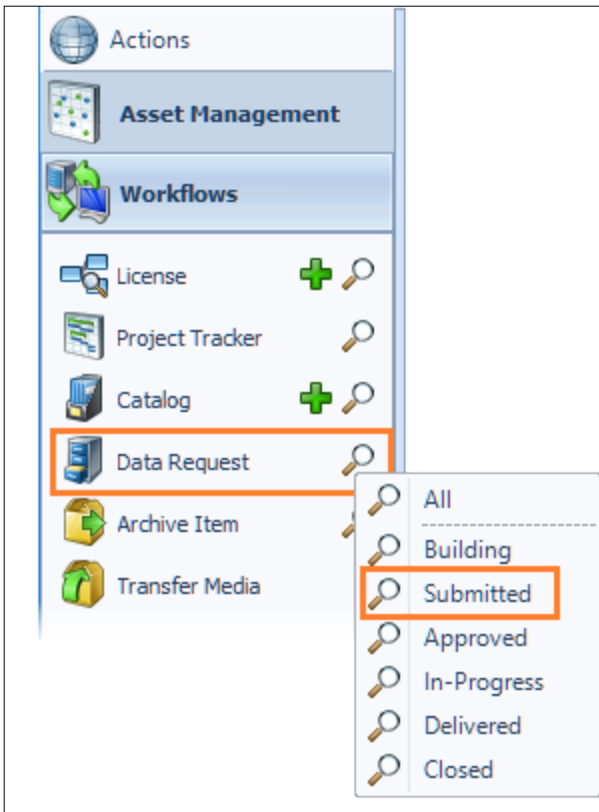
Orders submitted via Exploration Archives Browser automatically display with a *Submitted* status.

5.4 Approve a data request

Data requests in **Submitted** status are available to review for approval.

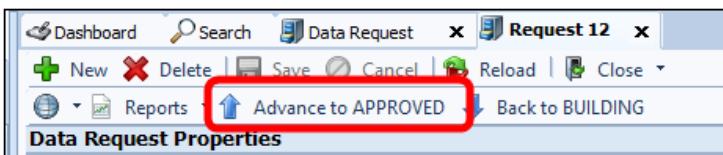
To locate a **Submitted** data request:

Click search next to **Data Request** and select **Submitted**.



The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

Review the details of the order to ensure they are correct. If the request is accurate and acceptable, click **Advance to APPROVED**.

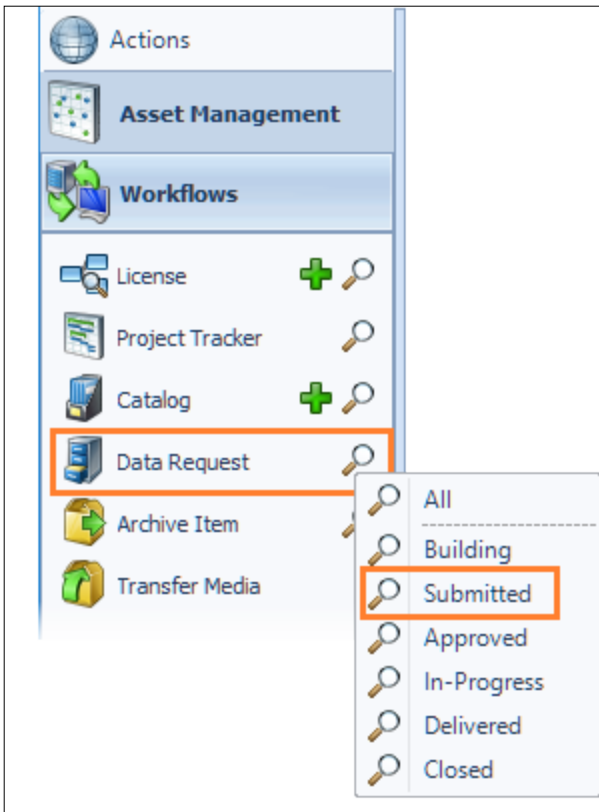


If the request is not acceptable, click **Back to BUILDING**.

Data requests in **Submitted** status are available to review for approval.

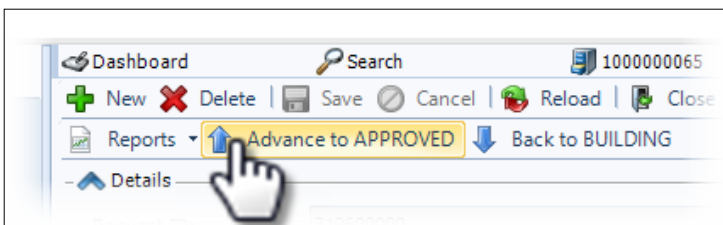
To locate a **Submitted** data request:

Click search next to **Data Request** and select **Submitted**.



The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

Review the details of the order to ensure they are correct. If the request is accurate and acceptable, click **Advance to APPROVED**.

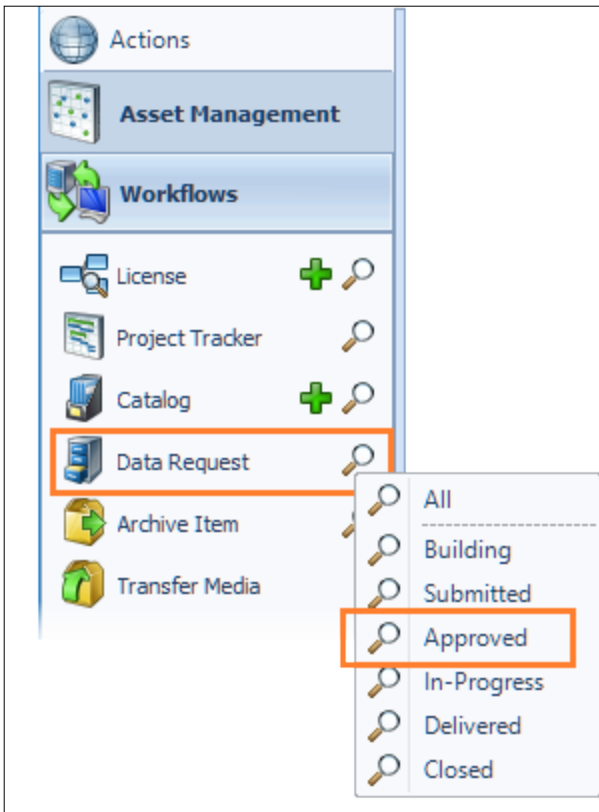


If the request is not acceptable, click **Back to BUILDING**.

5.5 Execute a Data Request

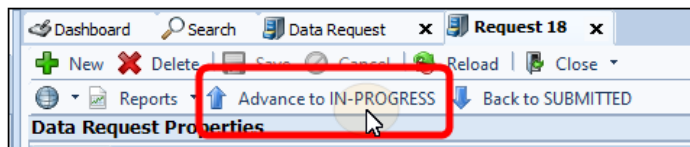
Data Requests in *Approved* status are ready for executing.

To locate an *Approved* data request, click search next to **Data Request** and select **Approved**.

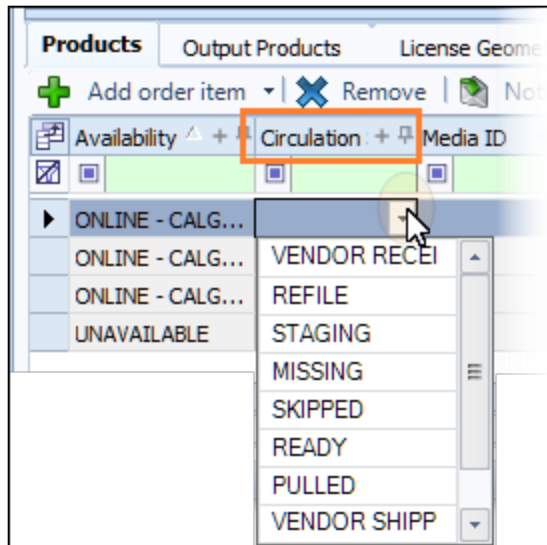


The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

1. Click **Advance to IN-PROGRESS** and begin processing the order.

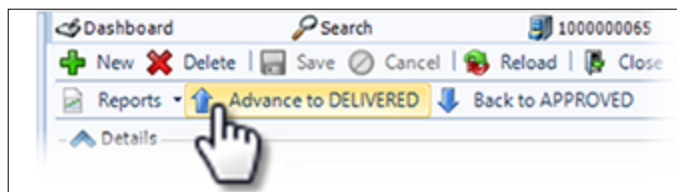


2. In the lower panel of the **Data Request** module, use the **Products** tab to track progress as you prepare the data. Use the **Circulation** column to update the location of items.



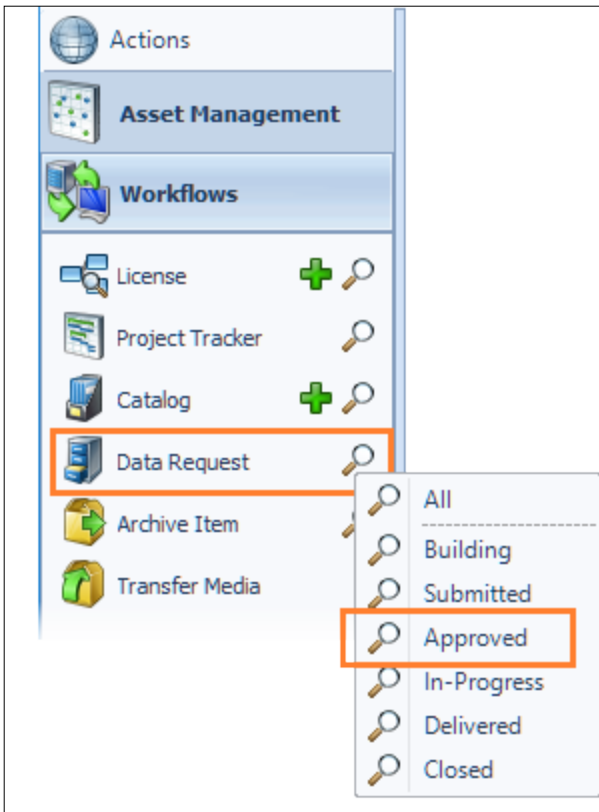
If your company workflow uses MobileMedia, these locations update automatically. For detail, refer to Using MobileMedia™.

3. When all items have been sent, advance the status of the data request to *Delivered* by clicking **Advance to Delivered**.



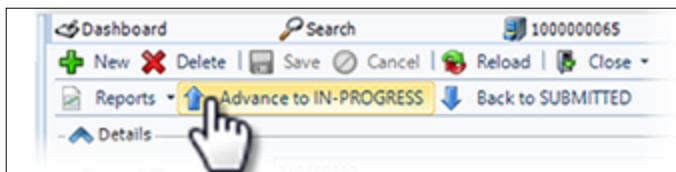
Data Requests in *Approved* status are ready for executing.

To locate an *Approved* data request, click search next to **Data Request** and select **Approved**.

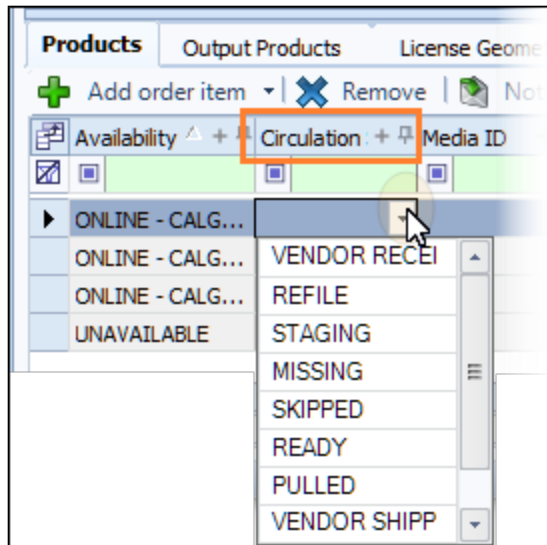


The results open in the **Search** module. Double-click on a data request in the grid to open. The data request opens in the workspace.

1. Click **Advance to IN-PROGRESS** and begin processing the order.

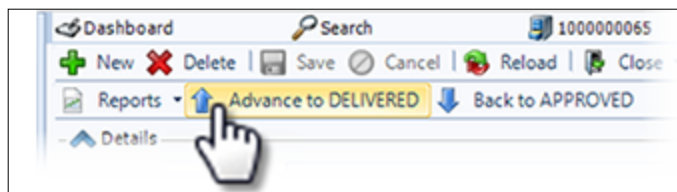


2. In the lower panel of the **Data Request** module, use the **Products** tab to track progress as you prepare the data. Use the **Circulation** column to update the location of items.



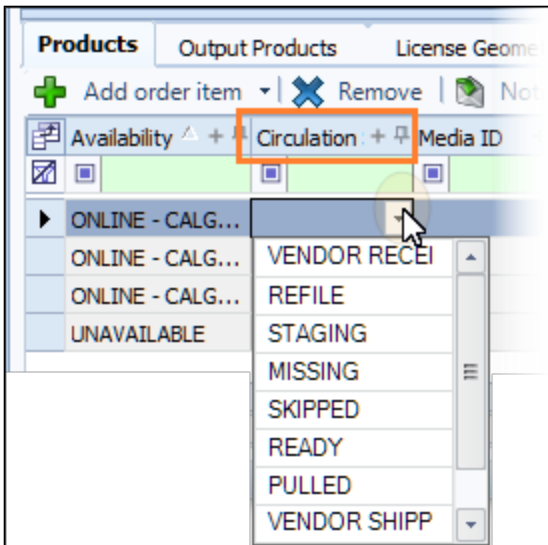
If your company workflow uses MobileMedia, these locations update automatically. For detail, refer to Using MobileMedia™.

3. When all items have been sent, advance the status of the data request to *Delivered* by clicking **Advance to Delivered**.



5.6 Monitoring delivery of data

The last step in a data request is to monitor the receipt and possible return of data. If the status of the data request is *Delivered*, the delivery progress will be tracked. The "Products" tab contains a "Circulation" column to monitor the delivery of products.



When all items have arrived at the expected destination, click **Advance to CLOSED** to change the status of the data request to *Closed*.

