



## Cleargistix 2.0 Overview

Cleargistix is excited to announce the release of Cleargistix 2.0!

This release is a combination of product enhancements as well as significant new features, fixes, and other new stuff.

At Cleargistix, we are always listening to our customers and the market to ensure we continue to be the flexible, configurable and very field usable Digital Field Ticketing Solution that helps oilfield companies save costs and time, streamline and accelerate workflows, reduce errors, improve efficiency and results in quicker and better management information.

The major components of Cleargistix 2.0 are Divisions, Enhanced Reporting, UI Enhancements and Integrations and Data Maps.

Utilizing Cleargistix 2.0, our customers will be able to:

- more precisely manage the activities of field operations using our new Divisions functionality where organizational activities can be grouped and managed such as by yard, area, business unit, department, type of work or supervisor,
- gain greater insights into operational and financial information captured through Cleargistix with enhanced reporting functionality that includes a bevy of flexible revenue reports,
- optimize the mobilization of their workforce through significant UI enhancements to field users using tablets, laptops, and phones. These enhancements include simplifying and mobilizing time tracking features and ticket approval enhancements including digital stamping, and mobile phone access.
- better and more easily manage information in Cleargistix through flexible and mappable export functionality and integrations with their back-end systems.

### Divisions

Our customers have been asking for Division to provide a means to segment data within their Cleargistix site. With our 2.0 release, we are pleased to be delivering this feature. Many customers have data that only applies to segments of their companies. With the Cleargistix Divisions feature, customers may configure some, all, or none of their user permission groups to limit data by division. Each user assigned to a permission group, set to limit data by divisions, will only see data linked to either one of the divisions the user is linked to, or linked to the All divisions item. Users assigned to permission groups not set to limit by division will continue to see all data they otherwise have permissions to see.

Using Divisions, Customers may control the visibility and accessibility of Core List Data (Company / Location / Employee / Asset / Item / Job Profile / Ticket Type) within the site based on the division(s) assigned to each List Item. This may be configured in whatever way makes the most sense for your



company and workflow (Yard / Business Unit / Type of Work /Supervisor etc.). All these lists may be linked to one, multiple, or the All divisions item.

Employees with Restricted Access to Divisions will only have access to Job Profiles and Ticket Types that have been linked to a division assigned to that employee. Jobs allow linking to a single division only. Tickets will automatically be linked to the same division as the Job. The only List Data that will be made available to the Job and Ticket will the List Data linked to that same division.

Division FAQs:

*Q: What should be the consideration of whether a company wants to do this or not?*

A: Division functionality allows data to be segmented. The desire to do this typically is motivated either by reducing clutter for users who only need access to a subset of site data or by the desire to provide an extra level of security by limiting what data users in discreet groups or units of your company can see and access.

*Q: What happens if a company does nothing (does not turn on Divisions)?*

A: Absolutely nothing happens if you choose not to enable Divisions. The feature will not be exposed, and your site continues to function as it always has.

*Q: What do I need to consider for how to set up Divisions?*

A: There are several things to consider when setting up Divisions. Most importantly is what does proper data segmentation look like in your company, if at all. Does it make sense to segment based on business unit? Or more granular, by location. The next big consideration is reviewing your data and deciding how it should be assigned to divisions. Finally, list data must be assigned and historical transaction data, jobs, and tickets, should be modified according to your division segmentation rules.

The Cleargistix Professional Services team is ready to work with you to review your options, strategies, and implementation of this feature. Whether a quick session to work through issues or hand holding from start to finish, we are here to help.

*Q: What if I set up a Divisions scheme now and we need to make changes to it later? or turn off Divisions all together?*

A: Nothing is permanent nor irreversible. Turning the system off simply hides the Division notions and everything reverts to working like it did before you enabled Divisions. Data may always be realigned, if needed, both manually and in bulk by our Professional Services team.



### Enhanced Reporting

One of the greatest values that using Cleargistix to capture field information provides is real time visibility into field activities and revenue. Cleargistix has enhanced this value with a collection of revenue reports supplying detailed insight. Whether by Company, Asset, Asset Type, Item, Division, or Position. Cleargistix revenue reports allow you to see revenue rolled up in a variety of manners, including by day for a selected week range. Having real time visibility into revenue allows for better resource allocation and other critical business considerations. Data is power. Cleargistix enhanced reporting unlocks, exposes, and makes your field data even more actionable. Revenue reports are automatically available from the filter menu on the Charge Lines desktop.

### UI Enhancements

Cleargistix prides itself in providing great UI making the usage of its Digital Field Ticketing Solution lite, fast, quick, and easy. From day one we have believed that for a field ticketing solution to succeed, it must be field usable, intuitive, and usable by even the least tech savvy among us. With Cleargistix 2.0 we are happy to announce that mobile phone usage has improved with more responsive scalable UI that adapts from desktop monitors, to tablets, down to phone screens, all without compromising functionality and ease of use. From gathering information in the field, logging time with our new time punch feature, to ticket approvals, mobile phone access with Cleargistix has reached new levels of mobile functionality in 2.0.

### Integrations and Data Maps

By collecting information in the field digitally, you have taken the first step in automating your business process data with efficient processes that do not require transcription or further keypunching. As a data source system, one of the most essential functions Cleargistix provides is moving data along in our customers' workflows. Whether for invoicing, payroll, CRM, inspection, business intelligence or other system requirements, data collected in Cleargistix commonly needs to be pushed to other systems. Cleargistix integrates natively with many systems and can easily be enhanced to integrate with others. Understanding though, that each customer's implementation of any given system has variability and use case nuances, Cleargistix is pleased to present flexible and configurable integration functionality via the new mapping facility provided by Cleargistix 2.0. Core and custom fields may easily be mapped giving you the power to link Cleargistix data to other systems according to your specific needs and requirements. Please contact our Professional Services depart to discuss your integration options.

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Cleargistix 2.0 is an important milestone in the continuous evolution of our ability to meet and exceed the needs of the market. Customer feedback continues to be the foundation upon which we build great solutions. We appreciate your comments and look forward to hearing how these new features help you manage your business.