

PHDwin V3 Onboarding Outline





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Intro - Class overview, concepts & terms

- What is PHDwin? What is it used for? What exactly can you do with the program? What concepts do you need to know? Engineering/economics etc.
- What are the inputs & outputs?
- How does PHDwin V3 compare to PHDwin 2.10? How does it compare to ARIES?

Logging into PHDwin databases

- Talk about SQL, instances, authentication, login name
- Where is the data stored? Quick discussion of local and network SQL setups
- Log Into Training Dataset

Imports, Exports & Backups

- Importing
 - Explain Standard file types & databases we can connect to
 - A custom import of a .csv file
- Transfer In
- Transfer out
- Talk about template .PHZ3 files

Navigating the interface

- Show and explain ribbon, forms, graphs,
- Show users how to use default views, but also how to create & save views
- Case list, sorts/filters, bookmarks, active case, and basic program navigation
- How to add a new case

Editing header info, production data & economic parameters

- Gen info & ID codes
- Daily, monthly, and test data
 - Case by case, pasting from excel
- Shrinkage
- Ownership & reversions

- Prices and price models. Overview of models.
- Expenses and types of OPEX
- Investments – explanation of linked dates

Building & applying models

- Building a price model
- Pasting in a price model
- Building an expense model

Global & Grid Editor

- Good examples of when to use which, show most commonly used ones but explain what all they can do
- Globally Apply a Price Model
- Grid Edit a set of Expenses
- Show how to add ID codes to grid editor

Graphing

- Opening graphs, adding new graphs
- Adjusting layouts & titles, graph templates
- Explanation of Graph Properties
- Adjusting projections
- Copying projections to other cases
- Autofit options

Reporting

- Show standard reports/report groups
- Show custom report tables & CSV report
- Show how to nest graphs with reports
- Show the Input Report and its options

Incremental economics

- Incremental case explanation and creation
- Display incremental cases on the graph

Creating group cases

- Create a Norm curve and explain normalization options
- Create a Summary plot and explain the options
- Briefly discuss economic group cases

Overview of Scenarios & Qualifiers

- Big overview on what they are, how they're used, how they're beneficial to people
- Show how to set them up and manage them, add cases etc.
- Show other important corporate settings

Resources and the Client Portal

- Show how to log into Client Portal
- Go through Client Portal resources and materials
- Access to support staff and further training