

SharpShooter Gold Office

■ Setup and daily-use guide

For the Office workspace and Office Server | 8 October 2026

Two programs, two jobs

SharpShooter Gold Office.exe is the workspace for reviewing surveys, importing or building plans, working with charts, and exporting reports.

Office Server.exe manages your directional company's accounts, shared jobs and transfers. It runs on the office computer that stays on and connected. You do not need to build a website.

Choose the correct package

- **Company package:** the Office workspace and server for a customer's company. Extract the entire package before opening either program. Keep the app and runtime folders together with the programs.
- **Field:** the separate SharpShooter installation used at the rig. The Office connection update must be installed there before the field user can exchange jobs with this server.

Before setting up your directional company

Choose one of your company's office computers as the server host. It can also run the planning workspace. Arrange a stable private network or VPN address and a way for other office and field computers to reach it. That chosen computer must stay awake while transfers are required; ask the network administrator to arrange VPN and firewall access.

Multiple office users can connect to the same server using individual accounts. Install the **Company package** on each licensed office computer and run the workspace there. Run **Office Server** on the chosen host. The system does not automatically move to another host when that computer shuts down. Use backup/restore to move it deliberately, then reconnect users.

Directional company is the drilling business running SharpShooter. **Client (oil company)** is the oil company hiring it. One server can manage jobs for several oil-company clients; each client does not need a separate host. Assign access by job. Separate directional-drilling businesses use separate company installations, Windows accounts/computers and server data folders. Do not share their credentials, connection profiles or local IPM libraries.

Each installation requires a valid activation for that computer. Give the displayed computer code to your software supplier and use the supplied key. A key for one computer does not activate another computer.

The licence agreement is shown the first time each program opens on a computer, and again when it changes. Slide recommendations and every other result are advisory: whether, where, how far and at what toolface to slide is the directional driller's decision (section 4.3 of the agreement).

Read the release status first

This guide describes the current Office controls. New or reset Office account passwords and encrypted server backup passwords need 7–128 characters with at least one capital letter and one special character, and must not contain the username or company code; existing passwords keep working. The Office Server certificate does not expire. When opening a connection file, compare the certificate fingerprint with the one shown in Office Server before signing in. Install the matching Field update so Office connection and company IPM checks are available at the rig.

Company IPM distribution and supported live AC calculations are available. A job still needs complete, applicable inputs; importing an IPM or seeing an imported report SF alone does not establish live AC readiness.

New in the workspace

The Office workspace shares the Field charts and survey sheet, so these arrived with it (21 September 2026):

- **Engineering menu, Office reports and units for every rig (8 October).** An **Engineering** menu at the top: Well control (kill sheet, MAASP, kick tolerance, swab and surge), Hydraulics, Torque and drag (now with buckling limits and critical rotary speeds), BHA tendency, Cementing, AC plots and the magnetic model - plus, in Office only, Standard well shape and **Targets, lease and hard lines**. The **Operations** menu has the **End-of-well report**, the **Motor performance report** and the **Company dashboard**. Each unit can be picked for the job, the rig feed warns of washouts, pack-offs, hanging up and drilling breaks, and the 3D Simulator can be drilled like a game. See **Engineering, targets and company reports** below.
- **Office Server Quick setup and Import people (8 October).** One screen sets up the company, the first well and the people; a whole crew comes in from an Excel or CSV list. See **First-time server setup**.
- **Column colours and the report logo (29 September).** Columns on the survey sheet opens the Survey columns window with a text colour beside each column (the Ahead column is green as standard; Standard colours puts them back; kept on this computer). The SharpShooter Gold logo is the standard report header image - Upload header image replaces it, Remove image leaves none, Use SharpShooter Gold logo brings it back. Communication is in the Operations menu at the top.
- **Rig activity: start-up, new hole and newer kinds (25 September, night).** A bit sitting still when the feed starts reads as off bottom until it drills; new hole is the hole getting deeper, not the bit moving; an activity kind an older Office copy does not know reads as Other with its name rather than refusing the transfer.
- **Drilling told apart without the pumps (25 September, later).** The activity log decides drilling and sliding from the bit and the blocks only: the bit picked up 0.3 m, or the string in the slips, is a connection; the pumps decide circulating, trips, reaming and cement. New Thresholds settings: Picked up and Least new hole.
- **Rig activity: trips and cement (25 September).** Back from a trip in, nothing is a connection until drilling resumes: filling pipe (pumps on, rotary stopped) stays Tripping in, and turning with the pumps on going down to bottom is Reaming / wash to bottom. After casing and before new hole, turning with the pumps on and going down is **2C Drilling cement**, shown on the KPI report and not counted as drilled metres. **AC Summary is now called Real Time AC**.
- **Client portal backup and fallback (24 September, later).** The Office Server keeps its own copy of the company's portal (wells, tools, price lists) on a new Client portal backup tab, and while the website is down Office and Field get the tools and prices from the server; the link at the bottom shows orange SERVER then.
- **Tickets, tool inventory and the client portal (24 September).** A Tickets menu (daily ticket, price list, cost summary), and the KPI report and **Operations > Tool inventory** on the Operations menu: the office adds, moves and ships tools, the rig enters their measurements and marks them On location, Ready to ship or Shipped back. With well data on the client portal, Office accounts can change tools and ticket prices there too. On the rig feed, the slide call uses the continuous INC only and is worked out survey to survey, the motor output shows live as the sensor goes into a slide, and the tool's raw survey readings can be mapped for MSA.
- **Database import, rig feed cable and BHA offset (23 September, evening).** A well database (.mdb) from other directional software offers the well being drilled first (the one the file marks Active) with its plan; its offsets show on the charts and in anti-collision, depths come in to the centimetre, and the satellite picture opens for files labelled ITRF2008. On a serial cable the rig feed reads the moment data arrives and Stop never waits. An assembly's bit to sensor becomes the section's survey sheet offset when it is run on that section. Later the same evening: surveys and slides from the rig feed can go on the sheet by themselves (two tick boxes on the Rig data feed window); the activity log calls a trip a trip - more than 40 m off bottom with the pumps off - and a stop within 40 m a connection, measured from the rig's own hole depth, with the BHA beside each line; the as-drilled survey tool carries on past an imported program; and **File > Update this job from a well database file** brings in a newer plan and offsets without touching what was drilled.
- **Corrected (MSA) surveys from a file (23 September).** Rig Data > Import corrected surveys (MSA) reads the provider's CSV, Excel, text or LAS file, picks the corrected INC and AZ, the depth unit and the north reference, and lines every station up with the survey sheet. Tick what goes on; Undo takes it back. The tie-in and a file in another north reference are never applied.
- **Licences and map credits (23 September)** under File: the satellite picture's credits with their links, the datum-grid attribution, and the open-source notices beside the program.
- **Survey sheet top, simpler to read (22 September).** Two cards: set-up (SECTION and ASSEMBLY, STEER and PACE as one-click switches with the target, START / NEXT COURSE / MOTOR, and what the motor figure was learned from on its own line) and the call (slide length and toolface in two dark tiles you can click to enter the slide, the slide line under them, the reason in a grey, amber or red banner).

- **Chart tools out of the way (22 September).** The chart buttons fold into a slim Chart tools strip above each chart; point at it and they drop down over the chart, go back to the chart and they fold away, click it to keep them open.
- **Learning page (22 September):** the learned motor output by assembly, formation and inclination, and interval by interval, with a CSV export.
- **Rotary steerable jobs.** A BENT MOTOR | RSS switch at the bottom of the sidebar, saved with the job. On a rotary steerable job the workspace turns blue, the slide columns leave the survey sheet, the slide calls become downlink calls (toolface and steering setting, expected dogleg, hold modes, back-off steps when the tool is not steering) and a **Downlinks** page appears: maker, system and version, size, the maker's downlink timing, the commands with their source and the job's own codes, a downlink log and the back-off list.
- **Pressure page (rotary steerable jobs):** a pressure drop box on top - flow, mud weight, nozzles box by box, a flow restrictor and the wanted range, with one total that is green in range, yellow low, red high - and under it where the pump pressure goes (surface, string, motor, MWD, rotary steerable tool, bit, annulus) against what the rig reads; hydraulic horsepower, HSI, nozzle velocity; annular velocities and ECD; the steering tool's pad differential against the band the tool hand wants.
- **BHA library across wells** with PDF import of a service company's BHA sheet, the assembly linked to each section, and the motor output learned per set-up (motor size, power section and bend, the bit, the flex and slick monels and the stabilisers; no serial numbers are kept), formation and inclination band - pooled across the fleet through the Office Server.
- **Torque & drag:** pick up, slack off, rotating and drilling loads and torque down the hole, buckling, the friction factor the hole is actually running at, and - against the planned well - whether the string reaches total depth. The Well Planning page has a Torque & drag button that runs the draft plan straight away.
- **Slide calls** planned from the bit on the pipe tally bit depths, never more than 2 degrees off the plan INC or AZ, stepping up Soft / Aggressive / Hard, with the hard-lens call. The sheet shows the next slide only (the rest are under Review goal & forecast); after a survey sees a slide, the hole out to the bit goes at the rotating tendency, not the slide's bend.
- **Downlink sheets and HIA.** Upload the tool hand's downlink sheet (Excel, CSV, text or PDF) on the Downlinks page to replace the job's copy of the codes; HIA is always on the call card with its code and a Log HIA button.
- **Metric or imperial** in one click on the Job settings page, and the rig feed in its own units (Canadian or US rigs).
- **Import EDR file** (Rig Data menu): a Pason, RigCLOUD, WellData / RigSense, WITSML CSV or LAS export read after the fact and played through the same rules as the live feed - the rig log, the Activity window and the slides.
- **Side windows** (Rig activity, rig data feed, Real Time AC, 3D chart) no longer sit on top: click the main window and it comes to the front.
- **Rosebud page** (under BHA): the rig feed's toolface on a rosebud like the phone's - green dots, the newest biggest, the newest toolface in the middle, the slide call as a gold wedge, INC/AZ, continuous INC and the rig's slide figure in the corners - with the sheet's slide recommendation and the live AC picture beside it. When the rig sends no new toolface the last one stays, faded, with its age. **Second computer** on the rig feed: the serial port to it is found by itself (Automatic - never the rig cable). On the sheet, **SECTION picks the BHA**; New, Edit and Delete BHA and the assembly a section ran are on the BHA page.
- **Operations menu:** the KPI report, the Tool inventory (now split by kind - DD tools, MWD tools, Other tools, Drill bits, Tubulars, Mud motors - with a Kind drop-down) and **Communication:** the rigs' morning reports, DD updates, tool orders and shipping manifests come up with the surveys and show on the Communication page; mark each one handled and the mark goes back to the rig with the plan. **Casing menu:** the casing strings for the 3D chart (they come over with a transferred job).
- **3D view, Drill pipe & BHA** (Appearance, on as standard): the well as steel drill pipe and the survey-to-bit stretch as a pipe in the Survey to bit colour, the red bit marker at the forecast bit depth. Widths are enlarged for visibility until you zoom in to true size. **Casing** entered under Job settings > Casing (it comes over with a transferred job) shows under Show > Casing as a see-through steel shell at its true outside diameter, a ring at each shoe.
- **3D view** redrawn: lit pipe over a floor with shadows, view buttons (Top, North, East, South, West, Side on, Along well, Fit), drag to orbit, right-drag to move, wheel to zoom; the vertical stays vertical.

- **Chart controls** in the top-left corner of the 3D view, the plan view and the vertical section: the keys drawn as keys and the mouse as tabs - W / S zoom, A / D move left and right, drag to turn (3D), Shift-drag or right-drag to move, the wheel, right-click for the views. The zoom goes in small steps (4% a wheel notch, 1.5% a press of W or S); zoomed in, the 3D background is black (zoomed out, the pad picture and formations show). **Hide** on the card or **Chart tools > Show controls** hides the card (kept on this computer); hidden, a small **Show controls** tab stays in the corner to bring it back.
- **Well Planning** builds a plan from sections; Office also has **Standard shape** (a slant or S-well solved to land on the target) and **Targets & lines** on that page.
- **Satellite view** lays the pad's satellite picture flat under the wells on the 3D chart and the Plan view. It is drawn at ground level, which is the KB height below the wellhead, and needs the pad latitude and longitude saved in Job settings. The picture comes straight from Mapbox and is kept with the job for 30 days (as long as Mapbox allows), then fetched again.
- **Rig & wellheads** stands the derrick over the well being drilled, to scale, and puts a wellhead on the top of every offset well.
- **Clear INC / AZ - keep the depths** on the survey sheet's right-click menu empties both angles on the selected rows and leaves the measured depths alone. A cleared row stops counting as a survey, so the latest-survey forecast moves back to the last row that still has angles.
- Well paths are now drawn as the arc the well really follows at every course length, within a centimetre, so a point measured at a depth sits on the drawn well however far apart the stations are.

The **Daily Setup and Use** guide has the detail for each of these.

First-time server setup

The quick way: Quick setup

On a new server, **Quick setup** opens by itself (it is also on the main bar). One screen asks for the directional company, the first well and the people - a name and Field or Office for each. **Set it all up** then does the rest: it creates the accounts with made passwords, gives everyone access to the well, picks the network address, sets up the encrypted connection, starts the server and saves the connection file to **Documents\SharpShooter Gold Office Server**. The passwords are shown **once** at the end with **Copy the sign-ins** - they are never saved, so copy them before closing. The numbered steps below do the same by hand and are where to change anything later.

Add a whole crew from Excel

Import people (Excel) on the main bar (and **Import names from Excel or CSV...** in Quick setup) reads an .xlsx or .csv list: column A the name (it becomes the sign-in name), column B Field or Office, and column C, optional, the wells by well name or job number, separated by commas. A heading row is found by itself. A preview shows who will be added; anyone already on the server, listed twice, with a bad name or with a well that is not found is left out and named. With no wells column, everyone gets every well. Passwords are made for each person and shown once on the last screen with Copy. Up to 500 people at a time; formulas in the workbook are never run.

1. Open and identify the server

Open **Office Server.exe** and complete activation if requested. Note the **Server data** folder shown in the banner. This contains live company data; it is separate from the installation folder. Keep access to the server computer limited to authorised administrators.

2. Set up your directional company

Click **Set up directional company**. Enter the directional company name and code, then confirm. Use the drilling business's identity here. Enter the oil company separately as **Client (oil company)** in each job's settings. The setup button becomes unavailable once that data folder already has a company.

3. Configure the address

Click **Connection setup**. For testing on the office computer itself, use **localhost** and port **8743**. Localhost will not connect a field computer to the office.

For field use, enter the office computer's stable private network or VPN address, use TCP port 8743 unless your administrator specifies another, and enable **Allow office / VPN connections**. Save the settings. The program does not configure the VPN, router or Windows firewall for you.

4. Add individual accounts

Open **Accounts**, click **Add user**, and enter a username and password. Choose **OFFICE** for a user who publishes plans or **FIELD** for a user who publishes surveys. Follow the minimum shown in your build. Avoid shared accounts so transfers can be traced to the right person.

Select an account before using **Reset password** or **Enable / disable user**. These changes revoke its current sessions. The user must sign in again when access is restored.

5. Create jobs and grant access

Open **Shared jobs**, click **Add shared job**, and enter the well/job name and job number. Select the job and click **Assign job access**. Select only the users who should access that job. Creating an account alone does not grant it access to every well.

6. Start and distribute the connection

Click **Start server** and confirm the status shows it is running. Click **Export directional company connection** to save the company's **.ssconnect** file. Supply that file to authorised company users and provide their credentials separately. Have them verify the company, address and certificate fingerprint through a trusted office contact.

To change Connection setup later, first click **Stop server**. Saving the changed settings generates a new certificate and revokes sessions. Export and supply a fresh connection file afterward, then start the server again for transfers.

■ Connect an Office or Field workspace

Sign in and link the correct well

1. Open the workspace and the local well/database you intend to use.
2. Open the three-dot menu at the top left, then **Office connection**. If this option is missing in Field, that computer needs the Field connection update.
3. Choose the company **.ssconnect** file supplied by the office. Check the displayed company, office address and certificate fingerprint before accepting it.
4. Enter the assigned username and password, then sign in. Only jobs assigned to that account are shown.
5. Select the correct shared job. Click **Link current local job** and review both well names in the confirmation. Later sends from this local job go to that shared well.

The accepted company address and certificate are remembered for that local database. Passwords are not saved. Sign in again after restarting, and recheck the connection when switching databases or companies.

Send work

Save the local edits before clicking **Send / queue current data**. Office accounts publish the selected primary plan. Field accounts publish saved surveys. Check the job link and the confirmation/status text before sending, then confirm a successful sent revision appears. Use **Retry saved queue** for an existing failed send.

A failed send stays queued in the local database for retry. Keep a backup of that database. A queued snapshot is the saved version from when it was captured; later edits may need a new send. Do not assume data reached the office until the program confirms it.

Field accounts can enable **Send saved survey changes every minute while signed in**. The workspace and connection must remain open and signed in. This is not a separate Windows service and it does not run after the workspace closes.

Receive and review

Click **Refresh shared jobs**, select the correct well, and choose **Receive surveys...** or **Receive plan....** Review the received revision and information before saving it.

- A received plan is saved as a new named plan. Choose **Select this as the primary plan now** only when you intend to change the selected plan.
- Received surveys open as a separate received survey job, preserving the existing local measurements. Check the revision and depths before using them for office planning.

Handle a send conflict

If the server has a newer revision, the queued send pauses. Choose **Review send conflict**, inspect the server revision, and decide whether the queued snapshot should be sent after it. **Send as newer revision** retains prior server revisions; it does not merge differing survey or plan edits for you.

Discarding a queued snapshot removes that send attempt. It does not delete the local well or revisions already held by the server.

Office planning, imports and reports

Start with a local database and job

Use the workspace's three-dot menu to create or open a database and create a job. Check the well name, **Client (oil company)**, units, surface/tie-in information and reference settings in **Job settings**. Keep a database backup before a substantial import or change.

Use the **Proposal**, **Geosteering**, **Well Planning**, survey and chart sheets for their respective tasks. **Well Planning** appears below **3D view** in the updated release. Check which plan is selected as primary before sending it to Field.

Build a plan in Well Planning

Open **Well Planning** (below 3D view). Set a unique plan name, station spacing, DLS limit and VS azimuth. **Start / tie-in** accepts manual surface coordinates or interpolates a recorded survey MD. **Load selected plan** makes a working copy of the primary plan; the draft is saved with the job.

Add section supports a vertical interval to kickoff MD, a tangent hold, a curve to INC/AZ at a specified DLS, an end MD/INC/AZ station, a hold to TVD and a coordinate target. Edit or delete a section to recalculate the sections after it; **Undo** and **Redo** restore draft changes. A coordinate target uses local TVD, N/S and E/W; its circular arc calculates arrival INC/AZ and DLS. Review the DLS messages and the plan and vertical-section previews.

Print PDF opens a printable planning report with reference details, plots, sections and stations; **Excel** exports the plan data and sections. **Copy to Proposal** saves a new named plan, copies coordinate targets and selects it as primary; an existing plan of the same name is not overwritten. **Torque & drag** runs the draft against the string to say whether it reaches total depth.

Import a provider's plan

In **Office connection**, sign in with an **OFFICE** account and open **Import office well data**. Supported choices include well-plan PDFs, supported text/CSV tables, and COMPASS/EDM **XML exports or ZIP files containing one XML export**. A raw proprietary EDM database or a live COMPASS connection is not supported by the XML import option.

Review the import preview, well identity, units, station depths, main plan and selected offsets. The COMPASS/EDM workflow can create a separate local database from the selected data. After changing databases, reopen Office connection, sign in, and link the imported local job to the intended company shared job.

Imported bearings and coordinates remain unchanged by automatic north-reference rotation. Confirm that the supplied files already use the references intended for the job.

A well database (.mdb) from other directional software opens through the workspace's **Open database**: the well being drilled comes first in **Main well / as drilled** - the one the file marks Active - with its plans; tick the offsets to bring along. If the chosen well has no plan in the file, the dialog says so, which usually means an offset was picked. The targets the file keeps for the well and its plans come in with it, and from a COMPASS EDM export the plan's formation tops too (placed on the job's KB and north, the same way as its surveys). A total field saved in gauss or microtesla is read as nanotesla, and the dialog lists the wells it corrected.

File > Update this job from a well database file brings a job up to date from a newer export - a revised plan, new offsets - without touching what was drilled: the plans in the file replace those of the same name (its primary plan becomes active), the offsets that came from a well database are replaced with their AC setup, the file's targets replace those of the same name, formation tops come in only when the job has none yet, and the surveys, slides, BHAs, tally, activity, the job's north, KB and magnetic settings, hand-added offsets and typed hole sizes all stay. A file in another north reference, or one that puts the well somewhere else, is refused and nothing changes.

Send the approved plan to Field

Select the intended primary plan, save it, and review the job link. Send the plan snapshot and confirm the new server revision. The field user receives and reviews it, then decides whether to make it primary. Sending does not silently replace a field user's active plan.

The transfer carries the supported plan information and accompanying data; it does not send the entire local database or unrelated wells. The transfer limit is 32 MB, including a plan PDF of at most 24 MB. If a file exceeds the limit, obtain a smaller authorised export rather than changing its extension.

Export a report

Open the **Reports** sheet. Choose **PDF**, **Excel**, **CSV** or **TXT**. Select columns and header information; upload a company image if wanted. **Save as** names a reusable report setup. **Load** applies its choices to another job while retaining that job's well details. Check the exported well, units, depths and annotations before sending.

Add survey-tool models

Use **Job settings > AC setup & IPM checks > Update IPM folder** for local approved models. Refer to the separate **SharpShooter Gold IPM Guide** in this folder for preparation, validation and company distribution. The IPM folder needs a separate backup; it is not included in a local well database backup.

Well data on the client portal

Your company can see its wells on the client portal at sharpshootergold.com/portal. It is off until an Office account turns **Well data on the portal** on there and ticks that the company has the right to put the wells' data there and is responsible for who sees it. While it is on, your copies send the open well whenever it changes: the well's details, surveys, plan, targets, slides, rig activity, daily tickets and the KPI report. Only your company's Office accounts can open it there (well list, well page with plan view and vertical section, surveys CSV). **Server > Client portal well data** in the program shows whether it is on, and has **Send now** and **Take this well off the portal**. The chain-link button at the bottom right of the window is green **LIVE** while the well is going to the portal, orange **SERVER** while the website is down and your Office Server stands in (below), and red **NOT LIVE** when nothing is going; point at it for the reason, click it to open that window. Turning it off on the portal deletes the wells there at once. The tool's raw readings and the survey check's grades are never sent.

While it is on, your Office accounts can also work on the portal: **Tool inventory** (add a tool, edit it, move it to a well, set its status and shipping, delete it, keep the company's own item types), **Ticket prices** for each well, and on each well page the surveys and slides (both download as CSV). Your copies of SharpShooter pick those changes up by themselves and send theirs, including the rig's measurements and statuses; the newest change of a tool wins. A Field copy can only change a tool's measurements, notes and the status On location, Ready to ship or Shipped back - the portal leaves out anything else it sends and says so.

Surveys, plans and rig data through the website

While Well data on the portal is on, the website carries the rig's surveys and slides to the office and the office's plan to the rig - no Office Server needed. Every 5 minutes this copy takes each well's new surveys as a received revision (open **Active jobs**), the same as a pull from the Office Server. **Server > Client portal well data** shows how it went, with **Check now**.

Send the plan through the website (same window) puts the open well's plan - stations, targets and the plan's PDF when it fits - on the website. The rig's copy takes it within a few minutes into its plan library and asks whether to use it now. A revision that came from the website sends its plan back to the same well; for a well you set up here first, the rig picks it under **Well on the website**. The last 5 versions of each well's surveys and plan are kept on the website, in your company's 2 GB.

The rig's WITS items come the same way every 5 minutes (90 days kept on the website) for **Rig Data > EDR traces**: the well's rig data against the time, tracks side by side like the rig's EDR, hover for the values, the wheel to move in time. See the Rig data feed guide for the controls.

When the website cannot be reached, a computer signed in to your company's Office Server sends and receives through it as before, and **Send the plan through the website** hands the plan to the Office Server instead. Raw survey readings, MSA rows and survey check grades never go; the website refuses them too.

Ticket prices, the rig's tickets and the KPI report

Tickets > Price list sets the job's charges: code, description, unit, rate and currency. They go to the rig with the plan and are locked there, so the office stays in charge of prices. The rig adds each day's ticket; the tickets come up with the surveys. Open **Tickets > Daily ticket**, **Cost summary** or **KPI report** on the received well. The office can add or change a day too - when a newer revision of the well arrives, whichever copy of a day was changed last is kept. The KPI report groups speed, downtime and cost.

Client portal backup on the Office Server

The Office Server keeps its own copy of your company's client portal - the wells, the tool inventory and the ticket price lists - on the **Client portal backup** tab. Every 15 minutes it asks the website, with the server's own Office Server licence, for what changed: each changed well is fetched whole (20 a round), and the last 10 copies of each well are kept, locked with the server's key. A well taken off the portal is marked, never deleted here. **Back up now** looks at once; **Save a copy of the well...** writes the selected well out as the portal's data file (JSON). The copy goes into **Back up server** too. Your company has to have well data on the portal turned on, and the Office Server's licence has to be on your company's portal.

If the website cannot be reached, your Office and Field computers that are signed in to the Office Server (Office connection) get the tools and ticket prices from the server instead, and their changes wait there; the server passes them on as soon as the website answers again. A Field account can change only what the rig can change on the website: measurements, notes and On location, Ready to ship or Shipped back. The link at the bottom of the window shows orange **SERVER** while this is happening.

Tool inventory

Operations > Tool inventory is the company's list of tools, kept in the office database (it works with no well open). **Add item...** picks a standard drilling item from the list - mud motor, MWD tool, gamma and resistivity subs, pulser, battery, UBHO sub, NMDC and non-magnetic HWDP, float sub, stabilizers, roller reamer, jars, shock sub, agitator, crossover and bit subs, drill collars, HWDP and drill pipe, rotary steerable tool, bit, hole opener and the surface kit - or a type you type in, which joins **Our own item types**. Give it a serial, size, description, status and well. **Move to well...** sends it to a well (and can mark it Shipped to location), **Shipping...** keeps the carrier, waybill and date, and the status can be set to any of In shop, Shipped to location, On location, Ready to ship, Shipped back or Received. **Delete** takes it off every copy and the portal.

A well's tools go to the rig with the plan. The rig sees them under the same menu, enters the measurements (bend setting, OD, blade OD, bearing play and so on - any name can be typed) and notes, and marks them On location, Ready to ship or Shipped back; that comes back with the surveys. Every change keeps a history line with who and when.

Engineering, targets and company reports

These came on 8 October 2026. The Engineering menu is in both Field and Office; targets and lines, the two reports and the dashboard are Office only. Every result is advice and arithmetic to check against: the well control decisions, the cement design and the pressures to pump to stay with the rig's procedures and the service companies.

The Engineering menu

Well control makes the kill sheet from the job (formation pressure, kill mud, initial and final circulating pressures, strokes and the step-down), MAASP and the kick tolerance, and the swab and surge of a trip. **Torque and drag** ends with the buckling limits and critical rotary speeds. **BHA tendency** gives the build a motor should make before the first slide, from the bend and the stabilisers. **Cementing** gives the slurry volumes, displacement and strokes, the pressure to land the plug and the centraliser spacing for a standoff. **AC plots** draws the ladder, separation factor and travelling cylinder plots, and **Magnetic model** fills declination, dip and field from the World Magnetic Model built in. The Daily Setup and Use guide has the detail.

Targets, lease and hard lines

Engineering > Targets, lease and hard lines (or **Targets & lines...** on Well Planning). **Add target**: a circle, ellipse, rectangle or polygon at a TVD - its centre and size, or the corners as N/S, E/W pairs - and the position uncertainty radius (filled from the plan's reported radii when the imported plan has them). The **driller's target** is the shape brought in by that uncertainty and is drawn dashed. **Add line**: a lease line or a hard line as N/S, E/W points, with a setback. The plan view shows the plan, the well as drilled, the targets and the lines; the checks list, for the plan and the well, each target hit or missed and by how far, and the closest each line comes, flagging a crossing or a setback broken. Well Planning shows the one-line answer for the draft as it is built.

End-of-well report

Operations > End-of-well report: the bottom-hole location, closure and vertical section; the distance from the plan at TD, above or below and right or left, and the furthest point from the plan; the highest inclination and dogleg; metres slid and rotated; the targets and lines; the speed, downtime and cost over the whole job; and each BHA run with the motor output its surveys measured. **Print PDF** or **Copy as text**.

Motor performance report

Operations > Motor performance report, for every job in this Office database or the open job: each BHA run with its motor and serial, the slide share, the output measured from the surveys (the courses at least half slid) against the expected yield and the book value, and the sliding and rotating ROP from the rig activity; then each motor model and each serial summed up. Link an assembly from the BHA library to each section on the BHA page so the motors are named.

Company dashboard

Operations > Company dashboard: every job in this Office database - the newest field revision of each synced well - with its last survey, distance from the plan (above or below, right or left), dogleg, the BHA, the lowest separation factor from the job's last AC answer and any target or line problem. Wells further from the plan than the limit you set, or with an AC warning, are marked red and listed first. It refreshes every minute while open; double-click a well to open it. A well shows "not worked out yet" for the SF until its AC has been worked out once on this computer.

Units and rig feed warnings

Each unit... beside METRIC / METRIC-CAN / IMPERIAL in Job settings picks pressure (kPa, bar, MPa, psi), mud weight (kg/m³, SG, ppg, lb/ft³, kPa/m, psi/ft), weight, torque and flow for the job - display only. **Thresholds > Feed alarms** sets the washout, pack-off, hanging up and drilling break warnings for the job, or turns them off.

■ Daily operation, backups and recovery

Start of day

Check that the office computer is awake, its private network/VPN is available, and Office Server is running. After a Windows restart, launch Office Server again. Saved connection settings may start the server when the application opens, but there is no installed Windows startup service.

Sign in to the workspace, check the company and linked job, refresh revisions, review incoming surveys and confirm any outstanding send attempts. Check **Activity** in the server when investigating who changed or transferred information.

Updates from the internet

The Office workspace looks on sharpshootergold.com for an update a minute after it opens and every 12 hours, and asks before installing. **Install update** adds the new program files beside the old ones: jobs, settings, accounts and everything the program has learned stay as they are. **Restart now** opens the new version; **Later** waits a day; **Skip this version** waits for the next. **File > Check for updates...** looks straight away and turns the automatic check on or off. Office Server says in its window when an update is ready, and its **Check for updates** button (Server options) installs it; restart the server afterwards, outside working hours. Only updates signed by SharpShooter are taken. A copy under Program Files cannot update itself: keep the program folder somewhere Windows lets you write, or install the full package.

Keep three kinds of backup

- **Server data:** use **Back up server** to create a password-encrypted **.ssbackup** file. Keep the password separately and store a copy away from the office computer. Use the minimum required by your installed build.
- **Local well databases:** back these up from the workspace. The server holds published snapshots, not every unsent local edit or unrelated local job.
- **IPMs and approvals:** back up the separate local IPM folder and the provider's approval/version records. Published company IPMs and approval records are included in the encrypted server backup; standalone local libraries need their own backup.

Restore a server backup

1. Arrange a recovery window and retain the current backup/data.
2. Click **Restore to new folder**, select the encrypted backup, enter its password and choose an empty destination folder.
3. Click **Open server data** and select the restored folder. Confirm the company, accounts and shared jobs before starting it.
4. Click **Start server**. Restored sessions are revoked, so users sign in again. If the address changes, update Connection setup and distribute a new connection profile.

Use the encrypted backup/restore workflow when moving to another computer or Windows account. Simply copying live server files is not a portable recovery method because the encryption keys are tied to the Windows user. The replacement computer also needs its own licence activation.

Closing and offline time

Where supported, closing the running server window leaves it in the Windows system tray. Reopen it from the tray icon. Use **Stop server** or **Stop server and exit** when you intend to stop transfers. Confirm the status; do not assume closing every window leaves it available.

Customer Office copies verify internet time at startup and every six hours while open. An already verified open program can continue for up to 48 hours from its last successful check. After that it locks access until verified again. Restarting requires a new verification. Saved data is retained. The updated Field release uses the same schedule; older installed Field copies may differ.

■ Troubleshooting and release limits

No connection or no jobs

Check that Office Server is running, the office computer is awake, and the field computer can reach the private/VPN address and port. A field profile using localhost points at the field computer itself. For an empty job list, check the company profile, account status and **Assign job access** on the server.

If a password or permission has changed, sign in again. Sessions also expire. Keep failed sends queued until the connection is restored.

Certificate could not be verified

Obtain the current directional company connection file and confirm its fingerprint with the administrator. A changed address or certificate requires a fresh file. HTTPS inspection software can replace the certificate; have the network administrator resolve the trusted connection path. Do not bypass verification or disable antivirus protection to make the transfer succeed.

The server/client checks have passed isolated tests for company separation, permissions, revision conflicts and encrypted backup/restore. A real office-to-field deployment still needs an end-to-end network test. Development-computer HTTPS interception prevented that live test from proving the final VPN setup.

File cannot be imported or sent

Check the actual format, file size, units and export options. COMPASS/EDM XML is an export format; renaming a binary database to .xml will not make it readable. Use a supported export, review its contents locally, then send the intended plan.

AC value is blank, missing or labelled as imported

Use **Job settings > AC setup / missing inputs** to identify missing survey history, approved model runs, starting covariance, per-well field data or separation settings. Configured supported inputs produce live SF, ellipse gap and oriented ellipsoids. Original imported results stay at their report depths. In **Office connection > Company IPMs**, Office accounts approve or withdraw versions; Field checks updates for new jobs after sign-in. See the IPM guide. A blank result is not evidence of clearance.

Windows says the app is unrecognised

This release is not publisher-code-signed. Obtain the package directly from the trusted supplier and have your IT administrator verify it under company policy. An unrecognised-publisher message does not by itself establish whether an application is malicious.

Information to include in a support request

Record the exact message, Office or Field edition/version, company and well involved, action being attempted, relevant depths and whether the problem occurs offline or over the VPN. Include the transfer revision or import format when relevant. Do not send passwords, private keys or unrelated company jobs.

Guide scope

The button labels and workflows were checked against the Office source and existing release notes on 12 September 2026; the workspace changes listed under New in the workspace were checked on 20 September 2026. Features awaiting final build, deployment or validation are identified explicitly. See **THIRD-PARTY-NOTICES.md** for component licences. Product names describing import compatibility do not imply endorsement by their owners.

■ Learned motor data

Your company's learning

Every completed survey files what the motor did against the assembly's set-up, the formation at the bit and the inclination band. The Office **Learning** tab (under BHA) shows your company's own learning table - this computer's wells and the ones that came in through your Office Server - with filters and a CSV export. Field copies have the Learning tab again with the directional driller's own learning - **Learned on: This job** or **All my jobs** - never the results kept online; the demo shows its sample job's own.

Learning online: kept within your company

From the late-September 2026 update, each copy also keeps its learning online, in its own space on the SharpShooter server, and reads it back live for its learned rates. Only **anonymous** results go: the BHA set-up fingerprint, formation, inclination band, rates, slide grade, drilling parameters and a rough area about 50 km square - never well, operator, rig or people names, licence or well numbers, locations, depths or dates. These results are never listed in any copy, including the Office Learning tab.

- Each copy reads back only its own results. Nothing is ever shared with another company.
- **Company data agreement** (client portal home page, **Your data**): turned on, your company's copies share their results with each other - and Pneuma's learned answers with your company's people - inside the company only. The portal records who turned it on and when.
- Turn the agreement off, or delete your company's data, on the same card at any time.

Pneuma, the SharpShooter built-in AI

Pneuma opens from the star on the survey sheet, **Pneuma - AI assistant** on the three-dot menu, or **Ask Pneuma** in the Help window. It works directional drilling numbers with exact calculators, answers from SharpShooter Gold's own library, walks WITS and rig-computer set-ups step by step, answers everyday questions and gives the weather live ("weather in Grande Prairie" - Environment Canada or the US National Weather Service; only the place name goes out).

- Before the first question it shows its privacy notice; it answers once you agree (again only when the notice changes). **Privacy** in its window shows the notice any time.
- It answers on SharpShooter Gold's own server with its own AI model - no outside AI company receives your questions.
- What it learns from your questions stays in each person's account, or inside the company with the company data agreement.
- **Attach...** adds a photo, PDF, CSV or text file to a question: she reads its words and numbers; the file is used for that chat only and not kept. She tells the time where you are.
- Pneuma is an AI and can make mistakes - check the numbers; the directional driller decides.

Share AC setup between Office and Field

Prepare the job in Office

1. Field signs in through **Office connection**, links the correct shared job and sends its latest saved surveys. The survey revision now includes the job's offsets and existing AC inputs.
2. Office receives those surveys as a separate local job. Link that received job to the same shared well. Work from this received job so the source-well identity and survey depths match Field.
3. Open **Job settings > AC setup / missing inputs**. Use **Advanced setup** to assign approved IPMs and tool runs, magnetic inputs, starting uncertainty and hole sizes, or import full one-sigma covariance. Match the confidence settings, surface margin and projection (SF is always centre distance ÷ MASD). Review every missing-input message.
4. In **Office connection**, choose **Publish AC setup**. Review the included wells, settings and readiness before publishing. Only Office accounts can publish AC setup.

Pull the reviewed setup in Field

1. Open **Job settings > AC setup / missing inputs > Pull AC setup from Office**. This opens Office connection. Sign in and link the local job if necessary, then click **Pull AC setup from Office** there.
2. The latest setup for that linked shared job is downloaded for review. Check the publishing user, revision, included offsets and remaining missing inputs, then choose **Apply AC setup**.
3. Open Real Time AC. Calculated SF and between-ellipse distance use the current path and configured uncertainty. **Needs inputs** opens the exact reason a calculation is unavailable. Original report results remain separately labelled at their report depths.

Receiving setup preserves Field measurements and original imported report rows. The previous AC inputs are retained locally. Office setup has its own version history, separate from surveys and plans, with the same company/job access controls and encrypted storage.

Changed surveys, missing information and retries

Field rejects setup for a different source well, survey geometry, north reference or depth datum. If surveys changed before receiving setup, send the latest revision and ask Office to prepare matching inputs. Covariance imported for an older path cannot be reused on a changed path. An applied IPM can continue calculating new surveys while its tool-run coverage and required inputs remain valid.

A failed AC publication stays queued. **Publish AC setup** retries that same reviewed snapshot. If another Office user published a newer revision, review the newer setup before using **Discard queued AC setup** and publishing a replacement. Earlier server revisions are retained.

Receiving an incomplete setup does not make its missing inputs valid. A report's SF, ellipse gap and semi-major radii do not uniquely identify a full uncertainty model. Office must obtain the original survey/tool history or an applicable full covariance export where required.