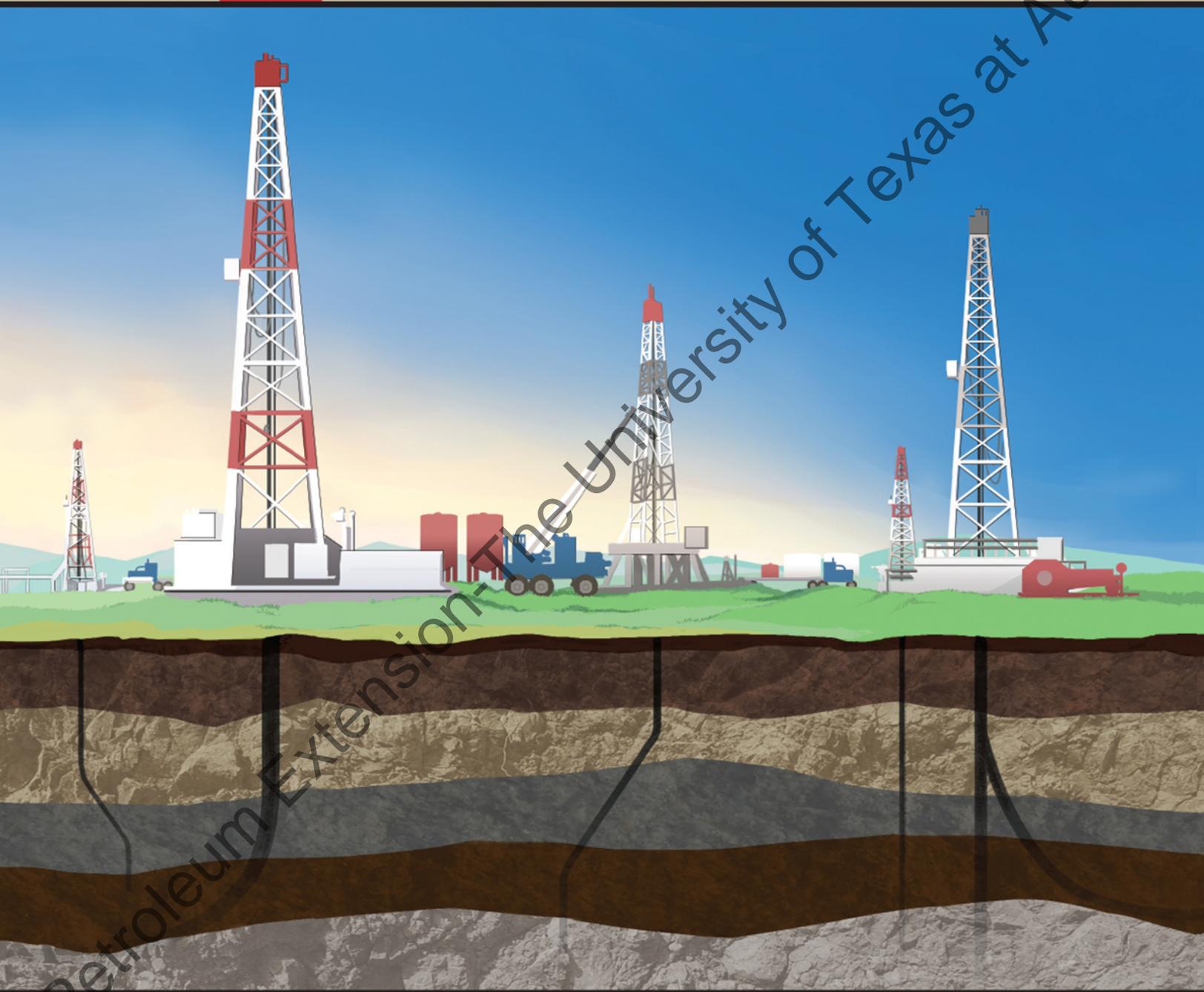


DRILLING  
TECHNOLOGY  
SEGMENT

1

# Introduction to Rotary Drilling



The University of Texas at Austin • Petroleum Extension Service

# Contents

Figures	vii
Foreword	xi
Preface	xiii
Acknowledgments	xv
About the Author	xvii
Units of Measurement	xviii
<b>1. Subsurface Geology</b>	<b>1</b>
Petroleum Geology	1
The Rock Cycle	5
Geological Structures	5
Earth Movement	8
Application of Geological Concepts	10
Exploration Geophysics	11
Subsurface Geology	11
Petroleum Reservoirs	13
Reservoir Rocks	14
Reservoir Traps	15
Formation Pressures	18
Summary	20
<b>2. Rotary Drilling Rigs</b>	<b>21</b>
Early Rotary Drilling	21
The Drilling Rig	24
The Rotary Drilling Process	26
Drilling Systems	29
Derrick, Mast, and Substructure	32
Power and Power Transmission	33
Drawworks	36
Blocks and Drilling Line	38
Rotary, Kelly, and Swivel	40
Top Drive System	43
Circulating System	44
Blowout Preventers	44
Auxiliaries	46
Air Compressors	46
Water Pumps	46
Other Equipment	46
Rig Design Considerations	47
High Substructures	48
Offshore Platforms	49
Rig Drive Systems	50
Special Systems for Offshore Drilling	50
Summary	52
<b>3. Circulating Equipment</b>	<b>53</b>
Mud Tanks and Pits	54

Mud Tanks	55
Arrangement	56
Mud Mixers and Agitators	58
Jet Hoppers	58
Mud Guns	59
Jet Siphons	60
Mud Agitators	61
Mud Pit Instruments	61
Pit Level Indicators	62
Pump Stroke Counter	64
Mud Weight Indicator	64
Mud Storage and Handling	66
Handling	66
Sacked Material	66
Bulk Mud	67
Mud Cleaning Equipment	68
Shale Shakers	68
Desanders and Desilters	69
Mud Centrifuges	72
Degassers	74
Mud Pumps	77
Output	81
Pump Liners	82
Dampener and Triplex Pumps	83
Supercharging	84
Trip Tank	85
Pill Tank and Slug Tank	85
Air Circulating Equipment	86
Summary	87
4. The Drill Stem	89
Drill Pipe	90
Design	90
Torsional Strength	93
Tensile Strength	93
Collapse Resistance	95
Burst Strength	95
Failures	96
Tool Joints	101
Design	103
Care and Handling	104
Wobble	105
Drill Collars	106
Weight on Bit	108
Holding the Drill Pipe in Tension	110
Providing Pendulum Effect	111
Stabilizing the Bit	112
Failures	113

Handling	117
Drill-Stem Tools	119
Drill-Stem Subs	119
Vibration Dampeners	120
Downhole Motors	121
Rotary Steerable Tools	122
Measurement-While-Drilling Tools	123
Lifting Subs	125
Stabilizers and Reamers	126
Pipe Wipers and Mud Boxes	126
Protectors	126
Operations Involving the Drill Stem	126
Tripping in the Hole	126
Tripping Out/Pulling Out of the Hole	127
Backreaming Operation	128
Critical Rotary Speeds	128
Summary	129
<b>5. The Bit</b>	<b>131</b>
Types of Bits	136
Roller Cone Bits	136
Design	139
Steel-Tooth Bits	141
Tungsten Carbide Insert Bits	142
Bearings	143
Jet Nozzles	147
Weight on Bit (WOB) and Rotary Speed Factors	147
Special-Purpose Roller Cone Bits	148
Roller Cone Bit Wear	150
Dull Bit Grading	157
Driller's Logs and Bit Records	160
Care and Maintenance	160
Diamond Bits	162
Design	163
Wear to Diamond Bits	165
Bit Whirl and Lateral Vibration	166
PDC Cutter Wear	169
Care and Maintenance	170
Fixed-Cutter Bits	172
Examining Drilling Costs	175
Summary	176
Conclusion	177
Appendix: Figure Credits	179
Glossary	187
Index	211



## About the Author

Dr. Robello Samuel is a Halliburton Technology Fellow working with Halliburton since 1998. He is currently a research and engineering lead for well engineering applications and responsible for research and scientific activities for new drilling technologies. He has more than twenty-five years of multidisciplinary experience in domestic and international oil/gas drilling and completion operations, management, consulting, software development, and teaching. His skills include practical and theoretical background in onshore and offshore well engineering, cost estimates, supervision of drilling operations, personnel, and technical review as well as creative establishment of project relationships through partnering and innovation. Concurrently, he has been an adjunct professor at the University of Houston and Texas Tech University in Lubbock for the past 10 years.

Dr. Samuel has written or cowritten more than 115 journal articles, conference papers, and technical articles. He has given several graduate seminars at various universities and keynote speeches at forums and conferences. Dr. Samuel has been the recipient of numerous awards including the Society of Petroleum Engineers (SPE) Regional Drilling Engineering Award and the “CEO for A Day (Halliburton)” award. He is presently serving as a review chairman on several journals and professional committees. He has also worked at Oil and Natural Gas Corporation (ONGC) in India from 1983 to 1992 as a drilling engineer.

Dr. Samuel, an SPE Distinguished Lecturer, holds B.S. and M.S. (mechanical engineering) degrees from The University of Madurai and College of Engineering, Guindy, and M.S. and Ph.D. (petroleum engineering) degrees from Tulsa University. Samuel’s unique blend of skills as a field engineer, researcher, and instructor has helped him author seven drilling books and a forthcoming book *Drilling Engineering Optimization*.

# Units of Measurement

Throughout the world, two systems of measurement dominate: the English system and the metric system. Today, the United States is one of only a few countries that employ the English system.

The English system uses the pound as the unit of weight, the foot as the unit of length, and the gallon as the unit of capacity. In the English system, for example, 1 foot equals 12 inches, 1 yard equals 36 inches, and 1 mile equals 5,280 feet or 1,760 yards.

The metric system uses the gram as the unit of weight, the metre as the unit of length, and the litre as the unit of capacity. In the metric system, 1 metre equals 10 decimetres, 100 centimetres, or 1,000 millimetres. A kilometre equals 1,000 metres. The metric system, unlike the English system, uses a base of 10; thus, it is easy to convert from one unit to another. To convert from one unit to another in the English system, you must memorize or look up the values.

In the late 1970s, the Eleventh General Conference on Weights and Measures described and adopted the Systeme International (SI) d'Unites. Conference participants based the SI system on the metric system and designed it as an international standard of measurement.

The Drilling Technology Series gives both English and SI units. And because the SI system employs the British spelling of many of the terms, the book follows those spelling rules as well. The unit of length, for example, is metre, not meter. (Note, however, that the unit of weight is gram, not gramme.)

To aid U.S. readers in making and understanding the conversion system, we include the table on the next page.

## English-Units-to-SI-Units Conversion Factors

Quantity or Property	English Units	Multiply English Units By	To Obtain These SI Units
Length, depth, or height	inches (in.)	25.4	millimetres (mm)
		2.54	centimetres (cm)
	feet (ft)	0.3048	metres (m)
	yards (yd)	0.9144	metres (m)
	miles (mi)	1609.344	metres (m)
		1.61	kilometres (km)
Hole and pipe diameters, bit size	inches (in.)	25.4	millimetres (mm)
Drilling rate	feet per hour (ft/h)	0.3048	metres per hour (m/h)
Weight on bit	pounds (lb)	0.445	decanewtons (dN)
Nozzle size	32nds of an inch	0.8	millimetres (mm)
Volume	barrels (bbl)	0.159	cubic metres (m <sup>3</sup> )
		159	litres (L)
	gallons per stroke (gal/stroke)	0.00379	cubic metres per stroke (m <sup>3</sup> /stroke)
	ounces (oz)	29.57	millilitres (mL)
	cubic inches (in. <sup>3</sup> )	16.387	cubic centimetres (cm <sup>3</sup> )
	cubic feet (ft <sup>3</sup> )	28.3169	litres (L)
		0.0283	cubic metres (m <sup>3</sup> )
	quarts (qt)	0.9464	litres (L)
	gallons (gal)	3.7854	litres (L)
	gallons (gal)	0.00379	cubic metres (m <sup>3</sup> )
	pounds per barrel (lb/bbl)	2.895	kilograms per cubic metre (kg/m <sup>3</sup> )
barrels per ton (bbl/tn)	0.175	cubic metres per tonne (m <sup>3</sup> /t)	
Pump output and flow rate	gallons per minute (gpm)	0.00379	cubic metres per minute (m <sup>3</sup> /min)
	gallons per hour (gph)	0.00379	cubic metres per hour (m <sup>3</sup> /h)
	barrels per stroke (bbl/stroke)	0.159	cubic metres per stroke (m <sup>3</sup> /stroke)
	barrels per minute (bbl/min)	0.159	cubic metres per minute (m <sup>3</sup> /min)
Pressure	pounds per square inch (psi)	6.895	kilopascals (kPa)
		0.006895	megapascals (MPa)
Temperature	degrees Fahrenheit (°F)	$\frac{°F - 32}{1.8}$	degrees Celsius (°C)
Mass (weight)	ounces (oz)	28.35	grams (g)
	pounds (lb)	453.59	grams (g)
		0.4536	kilograms (kg)
	tons (tn)	0.9072	tonnes (t)
	pounds per foot (lb/ft)	1.488	kilograms per metre (kg/m)
Mud weight	pounds per gallon (ppg)	119.82	kilograms per cubic metre (kg/m <sup>3</sup> )
	pounds per cubic foot (lb/ft <sup>3</sup> )	16.0	kilograms per cubic metre (kg/m <sup>3</sup> )
Pressure gradient	pounds per square inch per foot (psi/ft)	22.621	kilopascals per metre (kPa/m)
Funnel viscosity	seconds per quart (s/qt)	1.057	seconds per litre (s/L)
Yield point	pounds per 100 square feet (lb/100 ft <sup>2</sup> )	0.48	pascals (Pa)
Gel strength	pounds per 100 square feet (lb/100 ft <sup>2</sup> )	0.48	pascals (Pa)
Filter cake thickness	32nds of an inch	0.8	millimetres (mm)
Power	horsepower (hp)	0.75	kilowatts (kW)
Area	square inches (in. <sup>2</sup> )	6.45	square centimetres (cm <sup>2</sup> )
	square feet (ft <sup>2</sup> )	0.0929	square metres (m <sup>2</sup> )
	square yards (yd <sup>2</sup> )	0.8361	square metres (m <sup>2</sup> )
	square miles (mi <sup>2</sup> )	2.59	square kilometres (km <sup>2</sup> )
	acre (ac)	0.40	hectare (ha)
Drilling line wear	ton-miles (tn•mi)	14.317	megajoules (MJ)
		1.459	tonne-kilometres (t•km)
Torque	foot-pounds (ft•lb)	1.3558	newton metres (N•m)

# Subsurface Geology

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*In this lesson:*

- Petroleum geology
  - Geological structures
  - Application of geological concepts
  - Petroleum reservoirs
  - Early rotary drilling
- 

Thousands of years have passed since humans first scratched the surface of Earth in search of food, water, and a supply of energy. Oilwells are now being drilled to depths of almost eight miles (13 kilometres) in the continuing search for the lifeblood of the modern world—fossil fuels. The first oilwell in the United States was a 69-foot (21-metre) hole drilled by Edwin Drake in Pennsylvania in 1859. Several thousand wells have since been drilled offshore, and drilling has been achieved in over 10,000 feet (3,048 metres) of water. The quest to drill in ultra-deep water to reach depths of more than 40,000 feet (12,192 metres) is underway and within reach. Rotary drilling rig power has increased from 1 horsepower (hp) 100 years ago to more than 10,000 hp in the equipment now used offshore.

To understand the basic principles of rotary drilling, one must first understand the basic principles of geology, because most petroleum is found in the Earth's underground formations made of rock.

## Petroleum Geology

Geology is the science of the Earth and the processes of its change that have taken place over vast time, especially as recorded in rocks. Because petroleum is an accumulation of past life buried beneath thousands of feet of rock, geological studies play an important part in finding oil and gas.

# Rotary Drilling Rigs

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*In this lesson:*

- The basics of rotary drilling
  - The structure of rigs
  - Powering the rig
  - Rig components and systems
  - Blowout preventers and auxiliaries
  - Rig design considerations
- 

## Early Rotary Drilling

The first rotary drilling rig was developed in France in the 1860s for the mining industry. Variations of the rig appeared in the United States. It was unpopular at first, because drilling companies mistakenly believed that most petroleum lay in hard rock formations and therefore thought they could drill effectively using cable-tool rigs. In the 1880s, two brothers named M.C. and C.E. Baker drilled successful water wells in soft formations of the Great Plains of the United States with a rotary unit and fluid-circulating system. The rotary technique proved equally successful in the soft rocks of the Corsicana oilfield in Texas, which was accidentally discovered by drillers searching for water. When Anthony Lucas finally succeeded in drilling the Lucas well in the Spindletop oilfield in Texas using rotary drilling, the method spread rapidly in the developing industry (fig. 18). Before long, oilwells were springing up in great numbers using rotary drilling methods (fig. 19).

# Circulating Equipment

---

*In this lesson:*

- The fluid circulation system
  - Mud conditioning and accessory equipment
  - Storing and handling mud
  - Mud cleaning equipment
  - Types of mud pumps
- 

The main components of the fluid circulation system are the pump, hose and swivel, drill string, bit, mud return line, and the pits (fig. 40). Mud conditioning equipment includes shale shakers, mud agitators, desanders, desilters, mud centrifuges, mud-gas separators, and degassers. Accessory equipment to the mud circulation system includes the standpipe, chemical tank, mixing hopper, mud storage facilities, and mud pit instrumentation. Drilling fluid can be divided into two broad categories—liquid and gas.

## The Drill Stem

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*In this lesson:*

- Design and characteristics of drill pipe
  - Tool joints and drill collars
  - Drill stem auxiliaries
  - Operations involving the drill stem
- 

The *drill stem* includes all items used for rotary drilling from the swivel to the bit. This comprises the kelly, drill pipe, tool joints, drill collars, stabilizers, and miscellaneous other pieces of equipment such as drill-stem subs, reamers, stabilizers, and shock subs. The *drill string* is composed only of the drill pipe with attached tool joints. It is used to transmit the rotation of the rotary table or top drive and serve as a conduit for circulation of the drilling fluid. (Although by definition, the kelly is a part of the drill stem, it is not discussed in this lesson.)

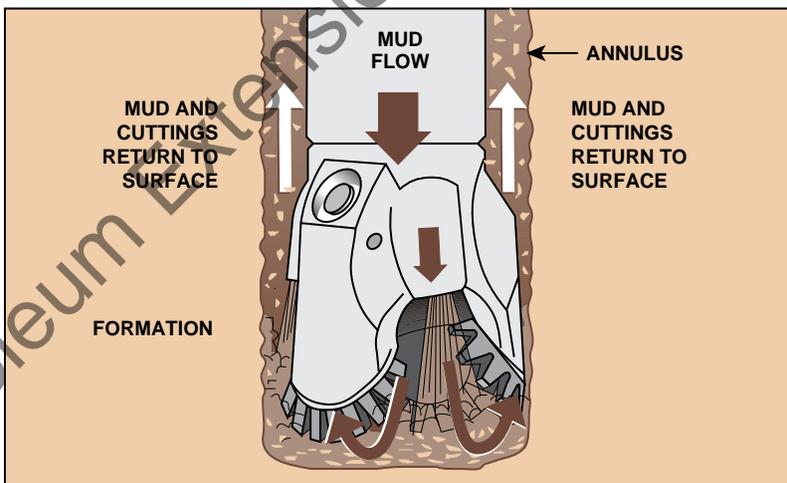
During the early days of rotary drilling, components such as pipe, couplings, and drill collars by any given manufacturer often would not match similar products made by another manufacturer. Wall thicknesses differed, so inside and outside diameters of items used in the drill stem varied considerably. Additionally, the threads would not always mate. This confusion led the American Petroleum Institute (API) to standardize threads and fittings. Specifications were also made for the types of material to be used, the methods of manufacturing, and the dimensions of pipe, threads, and mating connections.

## The Bit

*In this lesson:*

- How bits drill boreholes
- Bit types, selection, and performance
- Components of roller cone and diamond bits
- How to prevent untimely wear
- Calculating operation costs

The bit is the primary cutting, or boring, element used to drill for oil and gas. It is made up and positioned on the bottom-most portion of the drill stem where it is in contact with underground rock. The bit is designed to rotate along with the other components that make up the drill stem. As it does so, its cutting elements—which can include steel teeth, tungsten carbide inserts, or diamonds—cut and dislodge the layers of rock. As the rock is cut, drilling fluid traveling down the drill string is released out of the bit to displace the fragmented rock (fig. 91).



*Figure 91. A bit drilling the bottom of a hole. The drilling mud is released from the bit to carry cuttings to the surface.*

## Conclusion

The five lessons in this segment of the Drilling Technology Series teach the background necessary for someone embarking on a career in drilling technology. From the basics of petroleum geology to the specifics of a drilling rig and its components, this text covers important aspects of the rotary drilling process such as the circulating system, the drill stem, and the bit. With the completion of all five lessons, readers have gained important knowledge of the major components of drilling. To reinforce learning, an optional online assessment designed as an open-book test is available to go along with this book (can be purchased as a bundle with the book or as a separate tool).

For further understanding of the topic of rotary drilling, the next step is to take an in-depth look at routine drilling operations. Segment II provides the fundamentals of such operations for readers eager to receive practical procedural instruction. As a whole, the Drilling Technology Series collects a wealth of material about all phases of drilling and assembles it into four distinct manuals (segments). Although primarily designed for industry personnel and college students studying petroleum technology, the information is extremely useful for anyone who wants or needs to know more about rotary drilling.

# Index

- abrasion  
  from drilling fluid, 96, 150, 151  
  PDC cutters and, 170  
  tooth, 152–153
- abrasiveness, formations and, 135
- accumulator, 46
- AC generators, 46
- air-actuated mud density recording device, 65
- air bazooka, 67
- air circulating equipment, 86
- air circulating system, 86
- air compressors, 46
- air-cut mud, 82
- air hoists, 37
- American Petroleum Institute (API)  
  connections, tool joints and, 103  
  drill collar standards and, 108  
  makeup torques and, 117  
  Spec 5DP, 92  
  threads, fittings and, 89  
  tool joint nomenclature, 102  
  torsional yield strength, 93
- angular unconformities, 9
- annular preventer, 44
- annulus  
  cuttings and, 132  
  drilling fluid and, 31, 44, 174  
  mud through, 68, 73  
  sealing, 28  
  trip tank and, 85
- anticlinal folding, 11
- anticlinal traps, 16
- anticlines  
  about, 6, 7  
  wells discovered on, 10
- antiwhirl bits, 166, 172
- API. See American Petroleum Institute (API)
- artesian effect, 19
- Athabaska tar sands, 10
- Austin Chalk, 17
- auxiliaries, 46
- azimuth, 27
- back-pressure, 59
- backreaming, 43, 128
- Baker, M.C. and C.E., 21
- ball bearings, 145
- ball joints, 51
- barite  
  cone unit and, 70  
  handling of, 66, 67  
  in pill tank, 85  
  mud centrifuges and, 72  
  recovery, 73
- bearings  
  ball, 145  
  dull bit grading and, 158  
  grading of, 158, 159  
  inside a cone, 143  
  journal, 146  
  of roller cone bits, 143  
  roller, 145  
  sealed, 144, 161  
  wear/failure and, 150–151
- beds, sedimentary rocks and, 6
- bent drill pipe, 99, 113
- bent housing, 121
- bent members, metal fibers and, 114
- benonite, 58, 66, 69, 85, 86
- bent sub, 121, 129
- BHA. See bottomhole assembly (BHA)
- bi-center bit, 173
- bit(s). See also *diamond bits*; *dull bit grading*; *roller cone bits*; *teeth*  
  about, 131, 176  
  antiwhirl, 166, 172  
  basic, types of, 136  
  bi-center, 173  
  cone skidding, effects of, 155  
  core, 174  
  cuttings and, 132  
  drilling bottom of hole, 131  
  drilling junk and, 168  
  eccentric, 173  
  eccentric tool with, 173  
  fixed-cutter, 136, 168  
  for hard formations, 139  
  formations and, 133–135, 139  
  for soft formations, 139  
  guiding, process of, 122  
  Hughes Simplex rock, 138  
  jet air, cross section, 148  
  jet deflection, 149  
  motor steerable, 173  
  optimal, 134  
  requirements, 132  
  rock, 136, 138  
  roller cone, 136–140

- sidetracking, 174
- stabilization of, 112
- steel-tooth, 141–142
- tungsten carbide insert, 142–143
- types of, 136
- bit breaker, 161
- bit grading. See dull bit grading
- bit records, 160
- bit sub, 120
- bit whirl
  - about, 166–168
  - bottomhole pattern and, 166
- blind ram preventers, 44
- blocks and drilling line, 38–39
- blooie line, 86
- blowout(s)
  - degassers and, 74
  - described, 44
  - pit volume totalizers (PVTs) and, 63
- blowout preventer (BOP)
  - blowout prevention and, 28
  - high-pressure, 47
  - hydraulic power and, 46
  - offshore, 45
  - onshore, 44
  - pipe rams in, 94
  - riser pipe and, 51
  - substructure and, 33
- blowout prevention, 28
- BOP. See blowout preventer (BOP)
- borehole, drilling junk and, 168
- bottomhole
  - pattern, 166
  - pressure, drilling fluid and, 174
  - temperatures, 163
- bottomhole assembly (BHA)
  - bit whirl and, 166
  - predictive model designs, 167
  - vibration and, 128, 167
- box, 114–115, 116. See also *mud boxes*
- box failures, 116
- box joint, 105–106
- bradding, 154
- breakout cathead, 37
- broken pipe, 174
- broken teeth, 152
- bulk mud, 67
- bulk tank, 85
- buoyancy factor, 108, 109
- burst strength, 95
- butane, 33
- butterfly valve, 58
- cantilever drilling mast and substructure, 32
- carbonates, 17
- cased-hole logs, 28
- casing, 28
- casing strings, 173–174
- casing threads, 115
- cathead, 37
- catworks, 48
- cementation, 14
- cement-cut mud, 69
- cementing, 28
- center coring, 157
- centrifugal pumps, 77
- centrifuge
  - concentric, 73
  - cone-shaped, 69, 70
  - decanting, 72–73
- chemical storage system, mud and, 66
- circulating, 26
- circulating equipment
  - about, 53
  - air circulating equipment, 86
  - dampener and triplex pumps, 83–85
  - mud cleaning equipment, 68–77
  - mud mixers and agitators, 58–61
  - mud pit instruments, 61–65
  - mud pumps, 77–82
  - mud storage and handling, 66–67
  - mud tanks and pits, 54–58
- circulating fluid, 44
- circulating system
  - about, 31, 44, 52
  - main components of, 54
- clays, 66, 69, 86
- CMC, 66
- collapse resistance, 95
- compressors, 86
- concentric centrifuge, 73
- cone(s)
  - bearing located inside, 143
  - journal bearing inside, 146
  - roller bearing inside, 145
- cone erosion, 156
- cone offset, 141
- cone-shaped centrifuge
  - applications of, 70
  - operating principles, 69
  - underflow and overflow, 70
- cone-shell erosion, severe, 156
- cone skidding, 155
- core bits, 174
- core samples, 11
- corrosion fatigue, 96, 101
- Corsicana oilfield, 21
- costs, drilling, 175

- counters, 64
- cracks, fatigue, 114
- critical rotary speeds, 128, 129
- crossover sub, 120
- cross-pad flow configuration, 164
- crown block, 38, 49
- cutters
- friction and, 167
  - on PDC bits, 162, 169–170
  - roller cone bits and, 136
- cuttings
- drilling fluid and, 132
  - excessive, 128
  - jet siphon for moving, 60
- cyclic bending stress, 113
- dampener pumps
- about, 83–84
  - pill tank and slug tank, 85
  - supercharging, 84–85
  - trip tank, 85
- darcies, 14
- d’Arcy, Henry, 14
- data acquisition and monitoring system, 31
- decanting centrifuge, 72–73
- deep holes, 94
- deep wells, 28, 91, 101
- deflection tools, 27
- degassers, 56, 74–77
- delamination, 169
- derrick(s)
- blocks, drilling line and, 38
  - conventional, 47
  - mast, and substructure, 32–33
  - multiple-well, 49
  - standard drilling rig, 32
- derrickhand, 61
- desanders and desilters
- about, 69–71
  - cone unit as, 70
  - installation and operation of, 71
  - sand trap, degreaser and, 56
- desanding cones, 71
- desilters. See desanders and desilters
- diamond(s)
- high temperatures and, 163, 170
  - natural, grades and, 162
  - thermally stable polycrystalline (TSP), 163, 172
- diamond bits. See also *polycrystalline diamond compacts (PDCs)*
- about, 136, 162–163
  - care and maintenance, 170–171
  - cross-pad flow configuration, 164
  - design, 163–164
  - drilling junk and, 168
  - properly maintained, 165
  - radial flow configuration, 163
  - risk factors, 165
  - running, pointers for, 171
  - spirals and, 168
  - wear to, 165, 176
- diesel-electrical system of power transmission, 35
- diesel-electric rigs, 33
- differential pipe stick, 107
- directional drilling
- jet deflection bit and, 149
  - straight-hole drilling and, 27
  - top drive and, 43
  - torsional vibration and, 173
  - unrecoverable objects and, 174
- disconformities, 9
- doghouse, 46, 48
- dogleg, 97
- dolomitization, 14, 17
- domes, 6
- downhole conditions, 63, 170
- downhole motors, 121–122, 129
- downhole sampling, 28
- downhole tools, in drill stem, 173
- drag bit, 136
- Drake, Edwin, 1
- Drake well, 10
- drawworks
- brake systems for, 36
  - catheads and, 37
  - heavy-duty rotary drilling rig and, 36
  - high substructures and, 48
- drill collar(s). See also *drill collar weight*
- about, 106, 129
  - avoiding damage to, 117–118
  - being made by hand with tongs, 118
  - bending points in, 113
  - connection, point of pin and failure on loose, 116
  - drilling techniques and, 90
  - drill pipe and, 26, 107
  - failures, 113–117
  - handling, 117–118
  - holding drill pipe in tension, 110
  - joints, makeup control and, 115
  - on rack prior to run, 133
  - pendulum effect and, 27, 106, 111–112, 129
  - rotary and, 118
  - spiral, 107
  - stabilizing the bit, 112
  - tension and compression in, 114
  - threads of, 118
  - types of, 107
  - weight on bit (WOB) and, 108–109, 132

## Introduction to Rotary Drilling

- drill-collar sub, 120
- drill collar weight
  - calculation of, 108, 109, 110
  - effects of, 110
  - pendulum effect and, 112
  - tensile strength and, 94
  - weight on bit (WOB) and, 108–109
- driller's log, 160
- drilling costs, 175
- drilling fluid. See also *drilling mud*
  - air as, 87
  - bits and, 144
  - bottomhole pressure and, 174
  - categories of, 53
  - circulation of, 23, 26
  - friction and, 174
  - jet nozzle releasing, 140
  - of liquid and gas, 87
  - tooth abrasion and, 153
  - under pressure, 42
- drilling junk. See junk
- drilling line, blocks and, 38
- drilling masts, 47
- drilling mud. See also *drilling fluid*
  - released from bit, 131
  - storage of, 54
- drilling platform, multiple wells and, 49
- drilling rig
  - about, 52
  - categories of, 24
  - land, 24
  - offshore, 25
  - portability of, 25–26
  - power and power transmission, 33–35
- drilling systems
  - circulating system, 31
  - data acquisition and monitoring system, 31
  - hoisting system, 29
  - power system, 29
  - rotating system, 31
  - well control system, 31
- drill pipe
  - bending points in, 113
  - bent, 99, 113
  - burst strength, 95
  - collapse resistance, 95
  - design, 90–92
  - drill collars and, 26, 107
  - failures, 96–101, 113
  - grades, 92, 94
  - high-strength, 92
  - holding in tension, 110
  - inside diameter (ID), 90
  - measures of strength of, 97
  - minimum yield strength, 91
  - necking down, 100
  - outside diameter (OD), 90
  - rotary rig design and, 25
  - rotary table and, 33
  - rotation, 97
  - seamless steel, 91, 92
  - tensile strength, 93–94
  - tool joint marking to identify, 103
  - torsional strength, 93
  - upset, 92
- drill stem. See also *drill collar(s)*; *drill pipe*; *pendulum effect*; *tool joints*
  - about, 89–90, 129
  - downhole tools in, 173
  - drive bushing and, 40
  - hoisting, 26
  - kelly and, 41, 42
  - operations involving, 129
  - rotating, 26
- drill-stem subs, 119–120
- drill stem test (DST), 95
- drill-stem tools
  - downhole motors, 121–122, 129
  - lifting subs, 125
  - measurement-while-drilling tools, 123–124
  - pipe wipers and mud boxes, 126
  - protectors, 126
  - rotary steerable tools, 122–123
  - stabilizers and reamers, 126
  - subs (substitutes), 119–120
  - vibration dampeners, 120
- drill stem weight, 97
- drill string, 90
  - bit and, 26
  - deep wells and, 91
  - described, 89, 90
  - rotation of, 122
  - stick-slip and, 167
  - stuck, 133, 134
  - vibration modes and, 128
- drive bushing
  - drill stem and, 40
  - kelly and, 40, 41
  - kelly, rotary and, 41
- dry holes, 16
- DST. See drill stem test (DST)
- duck's nest, 54
- dull bit grading
  - bearings and, 158
  - IADC Dull Bit Grading Chart, 159
  - teeth and, 158
  - useful dull bits, 157
  - uses for, 158

- dump valve, 56
- duplex pumps, 77
- dynamic loading, 97
- early rotary drilling, 21–23
- Earth
  - crust, mantle, core, inner core of, 2
  - erosion and, 4
  - folds, buckling layers into, 7
  - formation of, 3
  - geologic time scale, 4
  - movement, 8–9, 20
  - rock cycle and, 5
  - sediments and, 3, 4
- East Texas Field, 17
- eccentric bits, 173
- eccentric tool with bit, 173
- EDMs. See electric downhole motors (EDMs)
- electric downhole motors (EDMs), 122
- electric-drive rigs, high substructures and, 48
- electric return-flow sending system, 63
- elevators, 43
- English-units-to-SI-units conversion factors, xix
- equivalent circulating density (ECD), 174
- erosion
  - compaction cycle and, 4
  - PDC cutters and, 170
- EU. See external upset (EU)
- exploration geophysics, 11
- external upset (EU), 92
- fatigue break, drill pipe
  - corrosion fatigue, 101
  - notch fatigue, 98–101
  - pure fatigue, 97
  - twistoff, 96
  - types of, 96
  - washout, 96
- fatigue cracks, 114
- faults/faulting
  - displacement and, 8
  - fault traps, 16
  - fault zone, 16
  - normal and reverse faulting, 9
  - types of faults, 8, 9
- fault trap accumulations, 16
- fault traps, 16
- FH (full hole) connections, 103
- field testing, 158
- fishing, 28, 133
- fishing tools, 168
- fishtail bit, 136
- fixed-cutter bits
  - about, 136, 172–174
  - antiwhirl bits and, 172
  - drilling junk and, 168
  - parts of, 137
- flare system, 86
- flat-crested wear, 152, 153
- floating platform, 50
- float valve, 75
- flow sensor, 63, 64
- fluid abrasion, 96
- fluid circulation system, 87
- fluid cutting, 82
- fluid friction losses, 80
- fluid hammer, 85
- fluid knocking, 81
- foaming agents, 86
- folds
  - anticlines and synclines, 6, 7
  - buckling layers of, 7
- formation fluids, 62
- formation pressures
  - abnormal, 18–19
  - classification of, 19
  - hydrostatic pressure and, 18
  - normal, 18
  - subnormal, 19
- formations (rock)
  - abrasiveness, 135
  - bit grading and, 158
  - bits and, 133–135, 139
  - hard, 134, 135
  - soft, 134, 139, 157
  - swelling of, 128, 173
- fracturing, 14
- friction
  - bearings and, 143, 144
  - bits and, 165, 167
  - blocks and, 38–39
  - bottomhole pressure and, 174
  - drilling fluid and, 174
  - galling and, 104, 106
  - gauge pad and, 172
  - torsional strength and, 93
- friction losses, fluid, 80
- full-gauge holes, 133, 134
- gall, 106, 146
- galling, 104, 128
- gas
  - drilling fluid, 53
  - entrained, 74
  - liquefied petroleum (LPG), 33
  - origination of, 13
- gas-cut mud, 74, 82
- gas slugs, 74

## Introduction to Rotary Drilling

- gauge pad, low-friction, 172
- gauge rounding, 150, 151
- gauge surfaces, 165, 174
- gauge wear, extreme, 151
- generators, 46
- geological concepts, application of
  - about, 10–11
  - exploration geophysics, 11
  - subsurface geology, 11–12
- geological structures
  - about, 5–7
  - Earth movement, 8–9, 20
- geologic time scale, 4
- gouge, 16
- grades of drill pipe, 94
- gravitometer, 11
  
- hardfacing, 102
- hard formations, bit for, 139
- heat checking, 170
- high-powered rig, 29
- high substructures, 48
- hoist assemblies, ground-mounted, 48
- hoisting, 26
- hoisting system
  - air hoists, 37
  - drilling line and, 39
  - rotary rig, 29
- holes. See also *overgauge holes*; *straight-hole drilling*;  
*undergauge holes*
  - bottom of, temperature and, 163
  - cost per foot, drilled, 175
  - deep, pipe grades and, 94
  - depths of, 29
  - drilling of, 24
  - dry, 16
  - full-gauge, 133, 134
  - making, 24
  - medium-depth, 54
  - mousehole, 128
  - open, 44
  - packed, 112
  - spiral-shaped, 168
- hook, 38, 42
- horsepower
  - hydraulic, 81, 147
  - mechanical, 148
- hose
  - rotary, 42
  - standpipe, 44
- Hughes Simplex rock bit, 138
- hybrid rotary steerable tool, 123
- hydraulic fluid, 46
- hydraulic horsepower
  - calculation of, 147
  - pumps and, 81
- hydraulic power
  - blowout preventers and, 46
  - pumps and, 81
- hydraulic system, 27
- hydrocarbon accumulations, 16
- hydrocarbons
  - anticlinal traps and, 16
  - migration and, 15
  - temperature and, 13
- hydrodynamic traps, 16
- hydrostatic pressure, 18
  
- IADC. See *International Association of Drilling Contractors (IADC)*
- IADC Dull Bit Grading Chart, 159
- ID. See *inside diameter (ID)*
- IEU. See *internal-external upset (IEU)*
- IF (internal flush) connections, 103
- igneous rocks, 2, 3
- indium, 144
- insert loss, 156
- inside diameter (ID), 90
- internal-external upset (IEU), 92
- internal upset (IU), 92
- International Association of Drilling Contractors (IADC), 158
- IU. See *internal upset (IU)*
  
- jet air bit, 148
- jet deflection bit, 149
- jet hoppers, 58–59
- jet nozzles
  - about, 147
  - drilling fluid and, 140
  - PDC bits and, 163
  - replaceable, 147
  - watercourses and, 140
- jet siphons, 56
- joints. See also *tool joints*
  - ball, 51
  - box, 105–106
  - drill collar, 115
  - earth movement and, 8
  - loose, failure and, 116
  - pin, 105–106
  - slip, 51
  - telescopic, 51
- journal bearings, 146
- junk
  - bits and, 168
  - cone skidding and, 155
- junk sub, 168

- kelly  
 drill collar and, 132–133  
 drill stem and, 42  
 drive bushing and, 40, 41  
 rotary and, 41  
 swivel and, 42  
 kelly saver sub, 120  
 kelly sub, 120, 126  
 keyseat, 128  
 kick(s). See also *well kicks*  
 blowout and, 44  
 equivalent circulating density (ECD) and, 174  
 formation fluids and, 62  
 reserve tanks and, 54  
 warning signs of, 61  
 kick pad, 129  
 kips, 109
- land rig  
 rotary rig design and, 24, 25  
 systems and components of, 30  
 lateral vibration, 166–168  
 ledges (keyseat), 128  
 lenticular zone, 15  
 lifting subs, 117, 125  
 lighting, rig, 46, 47  
 lignins, 66  
 lignosulfonates, 66  
 liquefied petroleum gas (LPG), 33  
 lithology, 28  
 logging-while-drilling (LWD) tools, 123  
 logs, driller's, 160  
 long substrate (LS) bond failure, 169  
 LPG. See *liquefied petroleum gas (LPG)*  
 LS. See *long substrate (LS) bond failure*  
 lubrication  
 rock bits and, 138  
 roller cone bits and, 144  
 roller cone bits, bearings and, 144  
 thread compounds and, 104–105, 116  
 wire rope and, 39  
 Lucas, Anthony, 21  
 LWD. See *logging-while-drilling (LWD) tools*
- magma, 2  
 magnetometer, 11  
 magnets, 168  
 makeup cathead, 37  
 makeup tongs, 105, 160  
 makeup torque, 99, 117, 126, 160  
 making hole, 24  
 maps, 12  
 marine riser, 50–51  
 mast, 29, 32, 33  
 master bushing, 100  
 MDMs. See *miscellaneous downhole motors (MDMs)*  
 measurement, units of, xviii–xix  
 measurement-while-drilling (MWD) tools  
 negative mud-pulse MWD system, 124  
 steerable system and, 122–123  
 mechanical efficiency, 81  
 mechanical horsepower, 148  
 mechanical rig, multiengine and chain-drive  
 transmission for, 34  
 metric system, xviii–xix  
 Mexia-Talco fault zone, 16  
 microns, 69, 73  
 migration, 13, 15, 20  
 minimum yield strength, 91  
 miscellaneous downhole motors (MDMs), 122  
 motion-compensating system, 52  
 motor, positive displacement. See *positive displacement motor (PDM)*  
 motor steerable bits, 173  
 mousehole, 128  
 mud. See also *drilling fluid*  
 buoyancy of, 108  
 degassed, 77  
 gas-cut, 74  
 mud agitators, 61  
 mud and chemical storage system, 66  
 mud boxes, 126  
 mud centrifuges, 72–73  
 mud cleaning equipment  
 degassers, 74–77  
 desanders and desilters, 69–71  
 mud centrifuges, 72–73  
 shale shakers, 68–69  
 mud conditioning equipment, 53, 87  
 mud conditioning system, 61  
 mud density, 64  
 mud density recording device  
 air-actuated, 65  
 electrical, 65  
 mud-gas separator, 74, 75  
 mud guns, 56, 59, 74  
 mud houses, 66  
 mud mixers and agitators  
 electrical power for, 47  
 jet hoppers, 58–59  
 jet siphons, 60  
 mud agitators, 61  
 mud guns, 59  
 mud-out sensor, 64–65  
 mud pit(s), 44  
 mud pit instruments  
 about, 61  
 mud weight indicator, 64–65

- pit level indicators, 62–64
- pump stroke counter, 64
- mud pumps
  - about, 77–81
  - centrifugal pumps, 77
  - fluid knocking and, 81
  - output, 81–82
  - power and fluid ends of, 79
  - pressure pulsations and, 80
  - pump liners, 82
  - suction head and, 80
  - triplex, single-acting, 78
  - triplex pump, 78
- mud storage and handling
  - bulk mud, 67
  - handling, 66
  - sacked material, 66
- mud system. *See circulating system*
- mud tanks and pits
  - about, 54–55
  - arrangement of, 56–57
  - desander and, 71
  - mud tanks, 55–56
  - water and, 58
- mud volume, 62, 63
- mud weight indicator, 64–65
- multiple-well derricks, 49
- MWD. *See measurement-while-drilling (MWD) tools*
- NC (numbered connections), 103
- necking down, 100
- negative mud-pulse MWD system, 124
- nipples, 117
- normal formation pressures, 18
- notch fatigue, 96, 98–101
- nozzles. *See jet nozzles*
- OC. *See rig operating costs (OC)*
- OD. *See outside diameter (OD)*
- off-center wear, 154–155
- offshore drilling, special systems for, 50–52
- offshore platforms, 49–50
- offshore rig, 25
- oil. *See also petroleum*
  - accumulations, 16
  - origination of, 13
  - oil-base muds, 69
  - oilfield(s)
    - salt dome, 16
    - typical early, 22
  - oil seeps, 10
  - oil-water contact, 16
  - oilwell, first in U.S., 1
  - onlap, 16
- open hole, 44
- open-hole logs, 28
- operations involving drill stem
  - backreaming operation, 128
  - critical rotary speeds, 128, 129
  - tripping in the hole (TIH), 126
  - tripping out/pulling out of the hole (POOH), 127–128
- organic theory, 13
- outside diameter (OD), 90, 108, 116
- overflow exits, 70
- overgauge holes
  - antiwhirl bits and, 172
  - avoidance of, 155
  - bit whirl and, 166
  - drilling assembly and, 155
  - off-center wear and, 154
- overpull, 93
- packed hole, 112
- packed-hole assemblies, 112
- packer, stuck, 95
- paddle flow sensor, 64
- PDCs. *See polycrystalline diamond compacts (PDCs)*
- PDM. *See positive displacement motor (PDM)*
- peat, 13
- pendulum effect
  - about, 111–112
  - of drill collars, 27, 106, 112, 129
- permeability, 14
- permeable bed, 13
- petroleum. *See also oil*
  - traps and, 15
  - vertical migration, 13
- petroleum geology
  - about, 1–4
  - rock cycle, 5
- petroleum reservoirs
  - about, 13
  - commercial productivity and, 20
  - formation pressures, 18–19
  - reservoir rocks, 14
  - reservoir traps, 15–17
- piercement dome, 16, 17
- piercement traps, 17
- pill tank, 56, 85
- pinchout of sand, effect of, 12
- pinch-outs, maps and, 12
- pinch-out trap, 17
- pin joint, 105–106
- pin threads, fouled and broken, 106
- pipe, broken, 174
- pipe wipers, 126
- pit level indicating instrument, 62

- pit level indicators, 62–64  
 pit volume totalizer (PVT), 62–63  
 platform, offshore, 49–50  
 plug, 16  
 point-the-bit rotary steerable tool, 122, 123  
 polycrystalline diamond compacts (PDCs)  
   cutter wear and failures, 169–170  
   diamond bits and, 136, 162  
   jet nozzles and, 163  
   spalling and, 179  
   torsional vibration and, 166, 167  
 polymers, 66  
 POOH. See *tripping out/pulling out of the hole (POOH)*  
 pore-space distribution, 14  
 porosity, 14  
 porous and permeable bed, 13  
 positive-displacement motor (PDM), 121  
 power and power transmission. See also *horsepower*;  
   *hydraulic power*  
   diesel-electrical system of, 35  
   multiengine and chain-drive, for mechanical rig, 34  
   on rig, types of, 46  
   power trains, 52  
   rotary drilling rig, 29  
 prehistoric times, 4  
 pressure gradient, 18  
 preventer. See *blowout preventer (BOP)*  
 prime movers, 29, 33  
 production separator, 75  
 production string, 28  
 propane, 33  
 protectors, 126  
 pulleys, 38  
 pulling out of the hole (POOH), 127–128  
 pulsation dampener, 83  
 pump(s). See also *mud pumps*; *triplex pumps*  
   centrifugal, 77  
   duplex, 77  
   underflow, 73  
   water, 4  
 pump liners, 82  
 pump-out connections, 56  
 pump stroke counter, 64  
 pump stroke indicator, 64  
 pump suction, 80  
 pure fatigue, 96, 97  
 push-the-bit rotary steerable tool, 122, 123  
 PVT. See *pit volume totalizer (PVT)*
- racking platform, 49  
 radial flow configuration, 163  
 ram preventers, 44  
 rate of penetration (ROP)  
   bit whirl and, 166  
   defined, 133  
   roller cone bits and, 139  
   weight added to bit and, 150  
   weight on bit (WOB) and, 147, 148  
 reactive torque, 157  
 reamers, 126  
 reaming  
   bearing failure and, 150  
   spiral-shaped holes and, 168  
   undergauge holes and, 134  
 reciprocating pumps, 64, 80, 82  
 records, bit, 160  
 reeved drilling line, 38  
 replaceable nozzles, 147  
 reserve pit, 54  
 reserve tanks, 54  
 reservoir rocks, 14  
 reservoir traps, 15–17  
 return-flow sending system, 63  
 rig. See *drilling rig*  
 rig design considerations  
   about, 47–48  
   high substructures, 48  
   offshore platforms, 49–50  
   rig drive systems, 50  
   rig drive systems, 50  
   rig lighting, 46, 47  
   rig operating costs (OC), 175  
   rig power, 33  
   riserless system, 52  
   riser pipe, 51  
 rock(s). See also *sedimentary rocks*; *subsurface geology*  
   core, 174  
   cutting, 132  
   reservoir, 14  
   shales, 13  
 rock bits, 136, 138  
 rock cycle, 5  
 roller bearings, 145  
 roller cone bits  
   about, 136, 176  
   bearings of, 143  
   care and maintenance, 160  
   classification of, 140  
   jet air bits, 148  
   jet deflection bit, 149  
   jet nozzles of, 147  
   parts of, 137  
   rock bit term and, 136  
   running, pointers for, 161  
   special-purpose, 148–149  
   two-cone bit, 149  
   watercourses and, 139, 140

## Introduction to Rotary Drilling

- roller cone bit wear
  - about, 150
  - bearings, 150–151
  - bit records, 160
  - bradding, 154
  - center coring, 157
  - chipped teeth, 152
  - cone erosion and insert loss, 156
  - cone skidding, 155
  - driller's log, 160
  - dull bit grading, 157–159
  - off-center wear, 154–155
  - tooth abrasion, 152–153
  - tracking, 154
  - unbalanced tooth wear, 155
- rolling cones, spirals and, 168
- ROP. See *rate of penetration (ROP)*
- rotary
  - about, 52
  - kelly, drive bushing and, 41
  - main functions of, 40
  - revolutions per minute (rpm), 47
- rotary base, 42
- rotary drilling, early, 21–23
- rotary drilling land rig, 30
- rotary drilling process. See also *drilling systems; power and power transmission*
  - blocks and drilling line, 38–39
  - circulating system, 44
  - derrick, mast, and substructure, 32–33
  - drawworks, 36–37
  - rotary, kelly, and swivel, 40–42
  - top drive system, 43
- rotary drilling rig
  - circulating system, 31
  - components of, 30
  - data acquisition and monitoring system, 31
  - drawworks for, 36
  - high substructures and, 48
  - hoisting system, 29
  - land rig, 30
  - major systems, 29, 30
  - operations of, essential, 26
  - power system, 29
  - rotating system, 31
  - well control system, 31
- rotary hose, 42
- rotary, kelly, and swivel, 40–42
- rotary speeds, critical, 128, 129
- rotary steerable bits, 172
- rotary steerable system (RSS), 122–123
- rotary steerable tools, 122–123
- rotary table
  - drill pipe and, 33
  - drive bushing and, 40
  - kelly and, 132–133
  - offshore platforms and, 49
- rotating head, 86
- rotating system, 31
- RSS. See *rotary steerable system (RSS)*
- sacked material, 66
- salt dome(s), 6
- salt dome oilfields, 16
- San Andreas Fault, 8
- sands, 14
- sand trap, 68
- SCR. See *silicon-controlled-rectifier (SCR) electric motors*
- sealed bearings, 144, 161
- seamless steel drill pipe, 91, 92
- secondary porosity, 14
- sediment(s)
  - Earth's formation and, 4
  - first, 3
  - sedimentary rocks and, 5
- sedimentary rocks
  - classification of, 6
  - compaction and, 5
  - organic theory and, 13
- seeps, 10
- seismic method, 11
- seismic waves, 11
- seismograph, 11
- self-sharpening wear, 153
- separator
  - primary use of, 74
  - production, 75
- settling tanks, 44, 56
- shaker screens, 87
- shaker tank, 56
- shales, 13
- shale shaker box, 64–65
- shale shakers
  - about, 68–69
  - desilter and, 71
  - electrical power for, 47
- sheaves, 38–39
- Shock Subs, 120
- shoulder, motor steerable bits and, 173
- sidetracking bit, 174
- silicon-controlled-rectifier (SCR) electric motors, 33
- SI units, xviii, xix
- skimming, 153
- slip-and-cut programs, 39
- slip bowl, 100
- slip joint, 51

- slip marks, 101
- slips
- old and new gripping elements and, 100
  - riding the pipe, 101
  - rotary table, 100
  - set too low, 99
  - tongs and, 98
- slug(s), 56, 74
- slug tank, 56, 85
- soft formations, bit for, 157
- solution channels, 14
- spalling, 170
- special-purpose roller cone bits
- jet air bit, cross section, 148
  - jet deflection bit, 149
  - two-cone bit, 149
- Spindletop oilfield, 21, 22
- spinning cathead, 37
- spiral-shaped hole, 168
- stabbing protectors, 126
- stabilizers, 112, 126
- standpipe hose, 44
- starches, 66
- steel mud tanks, 55
- steel-tooth bits
- about, 140, 141–142
  - cone offset and, 141
- steerable system, 122
- sticking, 134
- stick-slip, 167
- storage system, mud and chemical, 66
- straight-hole drilling, 27, 90
- strata, sedimentary rocks and, 6
- stratigraphic traps, 17
- stress concentrators, 98
- stress risers, 98
- strings, 173–174. See also *drill string*, casing
- stroke counter, 64
- structural traps, 16
- structure contour map, 12
- sub (substitute)
- about, 119–120
  - bent, 121, 129
- submerged mud gunning, 59
- subnormal formation pressures, 19
- substructure, 32, 33
- subsurface geology, 11–20
- suction head, 80
- suction pulsation dampener, operation of, 83
- suction tank, 56
- swivel, 42
- synclines, 6
- Système International (SI) d'Unites, xviii
- taper, motor steerable bits and, 173
- tar sands, 10
- teeth
- abrasion of, 152–153
  - broken, 152
  - chipped, 152
  - drilling fluid and, 23
  - dull bit grading and, 158
  - flat-crested wear, 152, 153
  - grading of, 158–159
  - of offset cones, 141
  - roller cone bits and, 136
  - self-sharpening, 142
  - self-sharpening wear, 153
  - unbalanced wear, 155
- telescopic joint, 51
- temperature-recording device, electrical mud
- density and, 65
- tensile strength, 93–94
- tensioners, 51
- thermally stable polycrystalline (TSP) diamonds, 163, 172
- thread compounds, 104–105, 116
- thread protectors, 104, 117
- TIH. See *tripping in the hole (TIH)*
- tong marks, 98
- tongs
- drill collar being made with, 118
  - makeup, 160
  - notch failure and, 98–99
- tool joints
- about, 101–102
  - API nomenclature, 102
  - care and handling, 104–105
  - design, 103
  - drill pipe and, 26
  - loose, symptoms of, 115, 127
  - marking to identify drill pipe, 103
  - nomenclature, 102
  - pin connection and box connection, 104
  - positioning, 98–99
  - rotary-shouldered connections, 103
  - standard welded, 101
  - torsional yield strength, 93
  - wobble, 105–106
- top drive system, 43
- torque-measuring equipment, 126
- torsional load, 104
- torsional strength, 11, 93
- torsional vibration
- PDC bits and, 166, 167
  - stick-slip, 167
- torsion balance, 11
- tracking, 154

## Introduction to Rotary Drilling

- traps
  - anticlinal, 16
  - geological conditions and, 15
  - hydrodynamic, 16
  - pinch-out, 17
  - reservoir, 15–17
  - structural, 16
- traveling block
  - guide, offshore platforms and, 50
  - hook, and drilling line, 38
- triplex pumps
  - about, 83–84
  - intake and discharge valves, 79
  - nominal pumping rates, 84
  - pill tank and slug tank, 85
  - short-stroke, 84
  - single-acting, 78
  - supercharging, 84–85
  - trip tank, 85
- tripping in the hole (TIH), 126
- tripping out/pulling out of the hole (POOH), 127–128
- trip tank, 85
- true vertical depth (TVD), 18
- truncation, 15
- TSP. See *thermally stable polycrystalline (TSP) diamonds*
- tubing threads, 115
- tubular equipment, 90
- tungsten carbide, 156
- tungsten carbide insert bits, 140, 142–143
  - cone-shell erosion, severe, 156
- turbine sleeves, 173
- TVD. See *true vertical depth (TVD)*
- twistoff, 96
- two-cone bit, 149
- two-way mud-pulse telemetry, 122
  
- UD-165 drill pipe, 91
- ultra-deep wells, 91
- unbalanced tooth wear, 155
- unconformities, 9
- underflow, 70, 71
- underflow pump, 73
- undergauge holes
  - bit wear and, 133
  - reaming and, 126, 134
- underground rock, alternating layers of, 135
- units of measurement, xviii–xix
- updip, 10
- updip seal, 16
- upset, types of, 92
  
- V-150 drill pipe, 91
  
- vacuum degasser
  - entrained gas and, 74
  - operation of, 76
- V-door, 117
- venturi tube, 58
- vertical cross sections, 12
- vertical migration, 13
- vibration. See *lateral vibration; torsional vibration*
- vibration dampeners, 120
- Vibroseis, 11
- volumetric efficiency, 81
  
- washdown, 48, 77
- washdown lines, 77
- washout, 96
- watercourses
  - conventional, 139, 140
  - eroded, 138
  - in early roller cone bit, 139
  - jet nozzles and, 140
- water pumps, 46
- wear. See also *roller cone bit wear*
  - diamond bits and, 165
  - flat-crested, 152
  - OD (outside diameter), 116
  - off-center, 154–155
  - PDC bits and, 169–170
  - self-sharpening, 153
- weight on bit (WOB)
  - about, 108–109
  - bit whirl and, 166
  - drill collars and, 132
  - overgauge holes and, 155
  - rate of penetration (ROP) and, 147, 148
  - rotary speed factors and, 147–148
  - tracking and, 154
- wellbore
  - directional drilling and, 27
  - undergauge hole near bottom of, 133
- well completion, 28
- well control system, 31
- wellhead fittings, 33
- well kicks, 56, 63. See also *kick(s)*
- well logging, 28
- well testing, 28
- White, Israel C., 10
- wildcat well, 135
- wireline, 174
- wireline logs, 11
- wire rope, 39
- WOB. See *weight on bit (WOB)*
- wobble, 105–106, 128
- Woodbine Sand, 17

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