

MODULAR HYDRAULIC OPERATOR FOR A SUBTERRANEAN TOOL

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FIELD OF THE INVENTION

[0001] The field of the invention is a modular hydraulic assembly that can be coupled to an otherwise mechanically operated tool and preferably a valve to allow the option of hydraulically opening the tool or valve once or multiple times.

BACKGROUND OF THE INVENTION

[0002] Different valve styles have been used downhole. One type is a sliding sleeve valve that can selectively cover or open holes in a casing or liner string. These valves are typically shifted with a shifting tool that grabs a recess in the sleeve and pulls or pushes the sleeve to open or close the wall ports in the tubular. Some examples are USP: 5,549,161; 7,556,102 and 7,503,390.

[0003] Formation isolation valves have been used that have a ball that is attached to a sleeve so that movement of the sleeve results in ball rotation between open and closed position. These valves typically included a piston responsive to tubing pressure that worked in conjunction with a j-slot mechanism. The valve was closed mechanically but could be opened once with a predetermined number of pressure cycles on the piston. Eventually, a long slot in the j-slot would be reached to allow a spring or a compressed gas reservoir to move an operating sleeve into another sleeve that was attached to the ball so that the ball could be rotated to the open position. In one design the ball was locked after moving into the open position but that lock could be overcome with another tool run downhole. There was also a provision for an emergency opening with a pressure tool if for some reason the pressure cycles failed to open the ball. This design is illustrated in USP 7,210,534. Other formation isolation valves that came as an assembly of a mechanically operated ball that had the option of opening with pressure cycles until a j-slot allowed a pressurized chamber charged to a known specific pressure to move an operating sleeve against another sleeve to get the ball to turn open are illustrated in USP 5,810,087 and 6,230,807 while USP 5,950,733 initiates

opening the ball with pressure that breaks a rupture disc to liberate pressure previously stored to move a sleeve to open that valve.

[0004] These combination valves with the hydraulic open feature bundled into a mechanical valve such as a ball valve are very expensive and in many applications represent overkill because a manually operated barrier valve such as with a shifting tool run in on coiled tubing, for example would be sufficient and within the budget for the particular project. On the other hand, the specification for some projects changes where the previously ordered manual barrier valve is determined to be insufficient for the application without a hydraulic opening feature. A hydraulically operated module of the present invention addresses this need for flexibility and further makes it possible for use of the module on a variety of tools when those tools can respond to shifting of an operating rod. The hydraulic module further incorporates either a onetime only configuration which is the simpler variation or another variation that can be re-cocked after an actuation with a tool run in from the surface to move the operating piston back up. The unique configuration of the cycling control assembly allows the ability to re-cock with minimal displacement of the operating rod so that the tool can be shorter because the operating rod does not need to be displaced after the valve opens any further than it takes to land a snap ring back in a groove so that the series of pressure cycles can resume when another hydraulic opening of the valve is required. These and other advantages of the present invention will become more apparent to those skilled in the art from a review of the description of the preferred embodiment and the associated drawings while recognizing that the full scope of the invention is given by the appended claims.

SUMMARY OF THE INVENTION

[0005] A modular pressure operated actuator can be coupled with a downhole tool to selectively operate it at least once. In the preferred embodiment the module can be mounted adjacent an isolation valve and after a fixed number of on and off pressure cycles allow a spring to push an actuator to operate the valve to an open position. The actuator, in another embodiment, can be reset with a tool run into the module to move the actuator back against

a power spring and hold that spring force until the pressure cycling begins again. The preferred application is for a formation isolation ball valve but other valves, such as sliding sleeves, or other types of downhole tools can be actuated with the module that permits a retrofit of a hydraulic operation to a heretofore purely mechanically actuated tool.

BRIEF DESCRIPTION OF THE DRAWINGS

[0006] FIGS. 1a-1d are a section view of the hydraulic module that is capable of a single operation downhole;

[0007] FIGS. 2a-2d are a section view of a resettable alternative embodiment shown in the position when pressure is bled off in the last cycle before the module is operated to actuate the downhole tool;

[0008] FIG. 3 is a rolled flat view of the mandrel showing the j-slot pin is in the FIG. 2 position;

[0009] FIG. 4 is a rolled flat view of the exterior of the ramp sleeve that faces the indexing sleeve and the snap ring;

[0010] FIG. 5 is a rolled flat overlay of the indexing sleeve and the ramp sleeve showing indexing sleeve openings that permit relative movement between them just before actuation of the downhole tool;

[0011] FIGS. 6a-6b show a portion of the module in FIGS. 2a-2d when pressured up just before opening;

[0012] FIGS. 7a-7b show a portion of the module in FIGS. 2a-2d when pressure is starting to be released as the module is about to operate the tool;

[0013] FIGS. 8a-8b show a portion of the module in FIGS. 2a-2d when the module begins to move an actuator to operate the tool;

[0014] FIGS. 9a-9b show a portion of the module in FIGS. 2a-2d when the module has fully actuated;

[0015] FIGS. 10a-10b show a portion of the module in FIGS. 2a-2d when the module has been reset.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

[0016] Referring to FIGS 1a-1d the module **10** has a top sub **12** connected to a mandrel **14** followed by a bottom sub **16**. Threads **18** secure the bottom sub **16** to a body **20** of the tool to be operated such as a valve. The tool **20** has

an operating member **22**, which when pushed by the pushrod **24** actuates the tool **20**. In one embodiment member **22** turns a ball to open a formation isolation valve (not shown). Member **22** has a shoulder **26** for mechanical operation independent of the module **10** in opposed directions such as with a shifting tool that is run in to make contact with shoulder **26** or another shoulder (not shown) for selective movement to open or close the valve.

[0017] Push rod **24** is at an end of piston **25** and piston **25** has seal **28** to seal against bore **30**. The lower end **32** is exposed to tubing pressure inside the module **10**. Above seal **28** the bore **30** is referenced to annulus pressure at **36** through passage **34** and a filter **38** to keep dirt out of passage **34**. This reference can be direct as shown or indirect using an intermediate floating piston (not shown) with a hydraulic fluid buffer so that bore **30** above seal **28** is exposed directly only to clean hydraulic fluid while from a pressure perspective the reference is still to annulus pressure at **36**. Piston **25** is secured with cap **40** to indexing housing **42**. Indexing sleeve **41** is free to rotate inside indexing housing **42** and has an inwardly oriented pin **44** that extends into a j-slot pattern **46**, such as one shown in FIG. 3, which is a part of the mandrel **14**. A spring **48** pushes off mandrel **14** and down against sub **50** that is secured at **52** to the indexing housing **42**. With each application of pressure to end **32** the indexing sleeve **41** goes up and down while rotating as pin **44** advances in the j-slot **46** until pin **44** comes into a long slot in the j-slot pattern **46** at which time the spring **48** pushes the piston **25** and the rod **24** against the member **22** to operate the tool that is attached to it. Movement of the indexing sleeve **41** moves fluid into or out of the annulus **36** through passage **54** that communicates with passage **34**. When the hydraulic module is not attached to the downhole tool, travel down stops when cap **40** hits bottom sub **16**, or on intermediate cycles, travel down stops when indexing sleeve **42** hits lug **43** on mandrel **14**. When the hydraulic module is attached to the downhole tool, on the final cycle, travel down stops when the valve operator shoulders in the downhole tool. This version of module **10** cannot be reset as it is a onetime operation to allow a purely mechanically operated valve to be cheaply converted to a hydraulic operation by the simple addition of a module **10**

before running the assembled components downhole. The j-slot can be configured for a variety of pressure application and removal cycles before actuation. The pin **44** can be a pair of pins disposed at 180 degrees so that when there is actuation the movement is guided at the pins **44** to prevent cocking of the index sleeve **41**. It should be noted that FIG. 3 has two long slots 6 cycles apart but that when two pins **44** are used it will take 12 cycles for both those pins to be aligned with the long slots and no other lugs blocking actuation for the actuation to happen. Depending on the number of cycles to actuation and the diameter of the components the use of blocking lugs can be eliminated and any alignment of the pins **44** with the illustrated long slots of the j-slot pattern of FIG. 3 will result in actuation of the piston **25** and the rod **24** to operate the preferred tool and that is a 90 degree isolation ball valve. Other tools such as sliding sleeve or packers with setting sleeves, for example can be optionally set hydraulically with the module **10**.

[0018] The advantage of the module **10** is that it allows more versatility in the use of tools that are adequate in some applications with only mechanical operation. However, other applications where there is a need for a hydraulic operation at least one time as an option, allows the operator to upgrade with the additional purchase and installation of the module **10**. It saves the operators with no use for the hydraulic option the expense of buying it because it has in the past been offered integrally with an otherwise mechanically operated tool.

[0019] FIGS. 2a-2d are a more fully featured version of the module of FIGS. 1a-1d and allows for a manual mechanical reset with a tool while the module is downhole so that multiple actuations are possible generally when used in a valve application, to repeatedly open a valve with pressure cycles after it has been closed mechanically. There are many similarities to the FIG. 1 embodiment but the basic parts and movements will be reviewed again with different item numbers to avoid confusion between the embodiments.

[0020] The module **60** has a top sub **62** connected to a mandrel **64**, which is connected to a bottom sub **66**. One or more rods **68** extend from respective bores **70** in bottom sub **66**. Rod **68** is connected to a respective piston **72** that

has a seal **74** in bore **70**. Seal **74** defines a high pressure side at lower end **76** which is exposed to tubing pressure at **78**. On the other side of seal **74** there is a passage system **80** that leads to annulus **82** through a filter **84** to keep out debris. A part of passage system **80** goes into annular space **86** defined by outer housing **88**, which is connected at thread **90** to top sub **62**.

[0021] Piston **72** is connected to indexing housing **92** at thread **94**. Indexing housing **92** is also connected at the opposite end to spring sleeve **96** at thread **98**. Spring **100** is disposed between sleeve **96** and mandrel **64**. Pressure in the tubing **78** displaces the piston **72** and with it indexing housing **92** and spring sleeve **96** so that the spring **100** is compressed. This movement is longitudinal in opposed directions with no rotation. The index housing has a shoulder **102** on which is supported the index sleeve **104** along with one or more radially inwardly oriented index pins **106** that extend into a j-slot pattern **108** on mandrel **64**. Index sleeve **104** rotates as pin or pins **106** track the stationary j-slot pattern **108** on mandrel **64**. A snap ring **110** is securely disposed between indexing sleeve **104** and spring sleeve **96** while extending into longitudinal slot **112** that has a lower end **114**. When the pressure in the tubing **78** is removed and the spring **100** is able to push down the indexing sleeve **104** that movement is stopped when snap ring **110** hits the lower end **114** of slot **112**. As best seen in FIGS. 2c and 5 the indexing sleeve **104** has a discontinuous ridge **116** with breaks **118**. Ridge **116** and shoulder **120** define a groove that for a predetermined number of application and removal of pressure cycles allows the indexing sleeve **104** to take with it the ramp sleeve **122** by keeping trapped lug or lugs **124** at the lower end of the ramp sleeve **122**. The rolled out ramp sleeve **122** with lugs **124** is shown in FIG. 4. Ramp sleeve **122** has integral to it at its lower end, a series of collet fingers **126** that terminate in heads **130** that with pressure to the tubing **78** bled off will rest as shown in groove **131** of mandrel **64**. Mandrel **64** also has an upper groove **132**. Indexing sleeve **104** has a groove **134** facing the ramp sleeve **122**. The purpose of these grooves will be explained when the part movement is further explained in the context of the actuation. Ramp sleeve **122** has a series of spaced apart fingers **136** best seen in FIG. 4 with tapered ends **138**. Fingers

136 ride on the mandrel **64** in slots lower than groove **112**. The purpose of the tapered ends **138** is to cam the snap ring **110** out of groove **112** so that at the proper time the lower end **114** of groove **112** will not act as a travel stop when pressure is taken off the tubing **78** and the spring **100** is pushing down the indexing sleeve **104** when its pin **106** is in the long slot **140** of j-slot **108**.

[0022] For all the cycles where there will be no actuation by extension of the rod **68** a sufficient distance to operate the tool that is mounted below it, FIGS. 2c and 2d represent the parts in the position where the pressure is bled from the tubing **78**. FIGS. 6a and 6b generally represent the part configurations when pressure is applied to tubing **78**. Comparing the two it can be seen that index sleeve **104** and its pin or pins **106** have moved up in j-slot **108** to position **142** in FIG. 3. The ramp sleeve **122** has moved up with index sleeve **104** but unlike index sleeve **104** the ramp sleeve **122** has not rotated while the index sleeve has rotated to get from position **144** to position **142** in the j-slot **108**. The collet heads **130** are now in groove **132**. Groove **134** has shifted up with the indexing sleeve **104**. Note that in this pressure up cycle as in the previous pressure up cycles that did not lead to actuation when pressure was bled off, the collet heads **130** are not trapped in groove **132** but are free to break loose upon application of a downward force to the ramp sleeve **122**. However, since FIG. 6 represents the final pressure up cycle before tool operation, it should be noted that the ridge **118** is no longer in registry with lug **124** but instead the opening **118** is now there. What this means is that when pressure is relieved after the FIG. 6 position is obtained, there will not be a downward force from ridge **118** on lug **124** as in all the previous pressure cycles. Note also that line **146** represents an upward travel stop to the indexing sleeve **104** that is shown schematically as it is located in a rotated section from the section being shown. Note also that snap ring **110** has moved up from the downward travel stop **114** in groove **112**.

[0023] After the position of FIG. 6 is reached the pressure in the tubing **78** is bled off and FIG. 7 illustrates the next movement of the parts. As the applied pressure is bled off, the indexing sleeve **104** moves down without taking the ramp sleeve **122** with it because opening **118** rather than ridge **116**

is juxtaposed at lug **124** of the ramp sleeve. Collet heads **130** are trapped by surface **148** of indexing sleeve **104** to groove **132**. Snap ring **110** has moved closer to tapered ends **138** that have remained stationary with the rest of the ramp sleeve **122**. The reason for all this is that with the collet heads **130** trapped, the ramp sleeve **122** cannot move as the indexing sleeve **104** keeps coming down such that the snap ring **110** will be forced up ramps **138** as the ramp sleeve is held anchored by collet heads **130**. In effect the snap ring **110**, which had before acted as the travel stop when pressure in the tubing **78** is removed, is no longer the travel stop as it has been forced out of its groove **112** after clearing the ramps **138**. Pin **106** is in position **150** in the j-slot **108** as shown in FIG. 3.

[0024] In FIG. 8 the snap ring **110** has ridden up ramps **138** and out of groove **112**. Groove **134** on indexing sleeve **104** is now aligned with collet heads **130** such that those collet heads **130** are no longer locked to groove **132** to allow for tandem movement of the ramp sleeve **122** and the indexing sleeve **104** to move under the force of spring **100** with shoulder **150** on indexing mandrel **104** engaging the lug **124** on the ramp sleeve **122** for the downward tandem movement. Pin **106** is now in position **152** in the j-slot **108** shown in FIG. 3.

[0025] In FIG. 9 actuation of the downhole tool has occurred by extension of rod **68**. The collet heads **130** have landed in groove **131**. The ramp sleeve **122** has traveled a sufficient distance so that the ramps **138** clear the lower end **114** of the groove **112**. The spring **100** has reached a relaxed state as the pin **106** has reached location **154** in the j-slot **108** shown in FIG. 3. Bottom sub **66** can serve as a travel limiter if needed as surface **156** approaches it.

[0026] FIG. 10 represents with a schematic arrow **158** a mechanical tool inserted into the tubing **78** to physically displace the rod **68** back up to location **152** shown in the j-slot **108** shown in FIG. 3. The snap ring **110** is back in groove **112** and against its lower end **114** so that it again can resist the force of spring **100** as the pressure cycling procedure can be restarted for another occasion of needed actuation. Pin **106** has remained in the straight j-slot groove **140** during this procedure. Opening **118** is still juxtaposed to lug **124**

on the ramp sleeve but at the next pressure up cycle the indexing sleeve **104** will rotate as it rises to present ridge **116** to lug **124** as a result of pin **106** going up path **160** shown in FIG. 3. Note the collet fingers **126** have not moved during the mechanical reset of FIG. 10 from the FIG. 9 position.

[0027] Those skilled in the art will appreciate that the FIG. 2 embodiment and its movements represent a modular assembly that can be coupled to any mechanically operated tool to add a pressure actuation feature. The further advantage of the FIG. 2 versus the FIG. 1 embodiment is that the module **60** can be pressure actuated multiple times with a mechanical reset in between actuations coming from a tool run into the module **60** such as a shifting tool, for example. With the design to allow multiple actuations described above those skilled in the art will appreciate that the rod **68** need only to be raised a short distance vertically enough to get the snap ring **110** back into groove **112** as the pin **106** tracks straight up in slot **140** of the j-slot **108** shown in FIG. 3.

[0028] Any number of pressure cycles can be designed into the tool before actuation limited only by the tool size that limits the ability to put more passages into the j-slot **108**. While long slots **140** are shown 6 pressure cycles apart, those skilled in the art will realize that with the use of a blocking lug there will be no actuation until the all pins **106** line up with the long slot **140** with no blocking lug in the way. It is also clear to see that the embodiment of FIG. 1 is far simple while allowing but a single operation using pressure cycles. Spring **100** can be replaced with a charged chamber that is properly sealed.

[0029] Operators who need a downhole tool such as an isolation valve in an application where mechanical operation is sufficient no longer need to buy assemblies that offer features they don't want and for a higher cost. On the other hand where the project requirements change before the start and it is decided that a pressure actuation feature is in fact needed, the modular design of the present invention allows a simple add on module that can be secured to the tool to provide this feature. Adding the module allows the option of hydraulic operation for at least one direction of actuation and still leaves open

the ability to operate the valve in opposed directions between open and closed purely mechanically even with the module attached.

[0030] While the invention has been described with a certain degree of particularity, it is manifest that many changes may be made in the details of construction and the arrangement of components without departing from the spirit and scope of this disclosure. It is understood that the invention is not limited to the exemplified embodiments set forth herein but is to be limited only by the scope of the attached claims, including the full range of equivalency to which each element thereof is entitled.

We claim:

1. A hydraulic actuation module assembly for adapting a subterranean mechanically operated tool mounted on a tubular string to an alternative mode of operation, comprising:
 - a housing having a passage therethrough and an actuator member;
 - a potential energy source selectively constrained in said housing;
 - a pressure responsive lock to selectively apply potential energy from said source to move said actuator and actuate the tool; and
 - a connection on said housing to mount said housing to the tool for reconfiguring the mechanically operated tool to operate at least in part hydraulically using the module.
2. The assembly of claim 1, wherein:
 - said lock is responsive to pressure cycles of application and removal of pressure in said passage.
3. The assembly of claim 1, wherein:
 - said actuator comprises a piston having one end responsive to pressure in said passage and another end exposed directly or indirectly to subterranean pressure outside said housing.
4. The assembly of claim 1, wherein:
 - said pressure responsive lock comprises a j-slot mechanism operably connected to said actuator member.
5. The assembly of claim 1, wherein:
 - said potential energy source comprises at least one spring or pressurized gas.
6. The assembly of claim 1, wherein:
 - said actuator member can be actuated more than once by said potential energy source.
7. The assembly of claim 6, wherein:
 - said actuator member, after an actuation, is displaced against said potential energy source to reset said lock.

8. The assembly of claim **7**, wherein:
said pressure responsive lock comprises a j-slot mechanism operably connected to said actuator member.
9. The assembly of claim **8**, wherein:
said actuator member is extended by expending said potential energy source when at least one pin on said j-slot aligns with an actuation slot;
said potential energy source is re-energized by reversing movement of said actuator member while moving said pin only in said actuation slot.
10. The assembly of claim **9**, further comprising:
a retainer selectively engaged to said housing to secure said potential energy source in response to movement of said pin only in said actuation slot.
11. The assembly of claim **10**, wherein:
said retainer rides in a groove in said housing while said pin moves along other slots than said actuation slot.
12. The assembly of claim **11**, wherein:
said retainer is forced against an end of said groove to act as a travel stop for said pin as it moves along other slots than said actuation slot in at least one direction.
13. The assembly of claim **11**, wherein:
said retainer is forced out of said groove to allow said pin to travel in said actuation slot.
14. The assembly of claim **13**, further comprising:
a ramp sleeve in said housing to selectively remove said retainer from said groove.
15. The assembly of claim **11**, wherein:
said retainer is moved in opposed directions by an indexing sleeve that supports said pin when said indexing sleeve is actuated by pressure cycles in said passage acting on said actuator member;
said ramp sleeve moves in tandem with said indexing sleeve for pin movements along other slots than said actuation slot.

16. The assembly of claim **15**, wherein:
said ramp sleeve is released from said indexing sleeve and temporarily secured to said housing as said retainer is removed from said groove by said ramp sleeve.
17. The assembly of claim **16**, wherein:
said indexing sleeve comprises a ridge with a break;
said release of said ramp sleeve from said indexing sleeve coincides with alignment of said break with a lug on said ramp sleeve.
18. The assembly of claim **17**, wherein:
said rotation of said indexing sleeve causes said alignment of said break with said lug coincidentally with said pin advancing toward said actuation slot to allow relative movement of said indexing sleeve relative to said ramp sleeve.
19. The assembly of claim **18**, wherein:
said relative movement of said indexing sleeve to said ramp sleeve allows said indexing sleeve to releasably lock said ramp sleeve to said housing as said ramp sleeve forces said retainer from said groove.
20. The assembly of claim **19**, wherein:
after said ramp sleeve removes said retainer from said groove, further relative movement of said indexing sleeve releases said ramp sleeve from said housing for subsequent tandem movement of said indexing sleeve and ramp sleeve powered by said potential energy source as said pin moves in said actuation slot to extend said actuating member and operate the tool.
21. The assembly of claim **9**, wherein:
said actuation slot is longer than other slots in said j-slot mechanism.