IN THE UNITED STATES DISTRICT COURT

WESTERN DISTRICT OF LOUISIANA

LAFAYETTE/OPELOUSAS DIVISION

OSCA, INC. Plaintiff, v. BAKER HUGHES, INC. and BAKER HUGHES OILFIELD OPERATIONS, INC. Defendants.	§ § § § § § § § § §	Civil Action No. CV00-0961 L-O Judge JUDGE DOHERTY Magistrate Judge MAGISTRATE JUDGE METHVIN JURY TRIAL DEMANDED

§ §

COMPLAINT

1. The Plaintiff OSCA, Inc. ("OSCA"), by its attorneys, for its complaint against the Defendants, Baker Hughes, Inc. and Baker Hughes Oilfield Operations, Inc. (collectively "Baker Hughes"), alleges as follows:

The Parties

2. Plaintiff OSCA is a corporation organized and existing under the laws of the State of Delaware with its principal place of business located at 156 Commission Blvd., Lafayette, Louisiana 70598-0627.

3. OSCA is an energy services company in the business of designing, developing and employing a wide variety of systems, processes and products for use in the completion of oil wells, including gravel pack assemblies and zone isolation systems.

4. Defendant Baker Hughes is also in the business of designing, developing and employing a wide variety of systems, processes and products for use in the completion of oil wells, including gravel pack assemblies and zone isolation systems.

5. Plaintiff OSCA and Defendant Baker Hughes solicit business from identical customers; namely, companies requiring oil well completion services, in particular, the services of gravel packing and zone isolation, both in the United States and elsewhere.

Jurisdiction and Venue

6. This is an action for patent infringement under Title 35 of the United States Code, 35 U.S.C. § 1 *et seq*.

7. This Court has subject matter jurisdiction under 28 U.S.C. §§ 1331 and 1338.

8. Upon information and belief, Defendant Baker Hughes is subject to personal jurisdiction in this judicial district because it has engaged in continuous, systematic, and extensive activities within the State of Louisiana and within this judicial district. Venue is appropriate in this judicial district pursuant to 28 U.S.C. §§ 1391(b) and (c) and 1400(b).

Infringement of U.S. Patent No. 5,865,251

9. On February 2, 1999, U.S. Patent No. 5,865,251 ("the '251 patent"), entitled "Isolation System and Gravel Pack Assembly and Uses Thereof", issued to Plaintiff OSCA. OSCA owns the entire right, title and interest to the '251 patent. A copy of the '251 patent is attached hereto as Exhibit A.

10. Defendant Baker Hughes, individually or through its agents and affiliates, with knowledge of the '251 patent, and without license or authorization from OSCA, has infringed and is infringing one or more claims of the '251 patent, either literally or under the doctrine of equivalents, by: (1) making, using, offering to sell, and/or selling in the United States; (2) inducing others to make, use, offer to sell or sell; and/or (3) contributing to the making, using, offering to sell, or selling by others in the United States, products and/or methods which are covered by one or more claims of the '251 patent.

11. Defendant Baker Hughes is liable to Plaintiff OSCA for patent infringement under 35 U.S.C. § 271.

12. Baker Hughes' infringement of the '251 patent has been and continues to be willful and deliberate.

13. OSCA has suffered damages as a result of Baker Hughes' infringement of the '251 patent, and will continue to suffer damages as a result of Baker Hughes' continued infringement, unless Baker Hughes is enjoined.

14. Baker Hughes' infringement of the '251 patent has caused irreparable injury to OSCA and, unless the acts complained of are restrained by the court, they will continue to occur and will continue to cause irreparable injury to OSCA for which there is no adequate remedy at law.

15. This case is exceptional under 35 U.S.C. § 285.

PRAYER FOR RELIEF

WHEREFORE, Plaintiff OSCA respectfully requests that judgment be entered in favor of OSCA and against Defendant Baker Hughes, and that OSCA be granted the following relief:

(A) Entry of a permanent injunction restraining and enjoining Baker Hughes, its officers, agents, servants, employees, and attorneys, and upon those persons in active concert or participation with them, from any further acts of infringement of OSCA's rights under the '251 patent, pursuant to 35 U.S.C. § 283;

(B) An award of damages sufficient to adequately compensate the OSCA for infringement of the '251 patent pursuant to 35 U.S.C. § 284;

(C) An award of prejudgment and post-judgment interest, pursuant to 35 U.S.C. § 284;

(D) An award of enhanced damages for Baker Hughes' willful and deliberate infringement of the '251 patent, pursuant to 35 U.S.C. § 284;

(E) An award of reasonable attorneys' fees, pursuant to 35 U.S.C. § 285; and

(F) Such other and further relief that the Court deems just and proper.

AND FOR ALL GENERAL AND EQUITABLE RELIEF, ETC.

DEMAND FOR JURY TRIAL

Plaintiff OSCA hereby demands trial by Jury on all issues so triable.

Respectfully submitted,

Date: April 11, 2000

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United States Patent [19]
Rebardi et al.

[11] **Patent Number: 5,865,251**
[45] **Date of Patent: Feb. 2, 1999**

[54] **ISOLATION SYSTEM AND GRAVEL PACK ASSEMBLY AND USES THEREOF**

[75] Inventors: **Wade Rebardi**, Carencro; **Donald H. Michel**, Broussard, both of La.

[73] Assignee: **OSCA, Inc.**, Lafayette, La.

[21] Appl. No.: **764,761**

[22] Filed: **Dec. 12, 1996**

Related U.S. Application Data

[63] Continuation-in-part of Ser. No. 368,964, Jan. 5, 1995, Pat. No. 5,609,204.

[51] **Int. Cl.**[6] **E21B 43/04**
[52] **U.S. Cl.** **166/278**; 166/51
[58] **Field of Search** 166/51, 278

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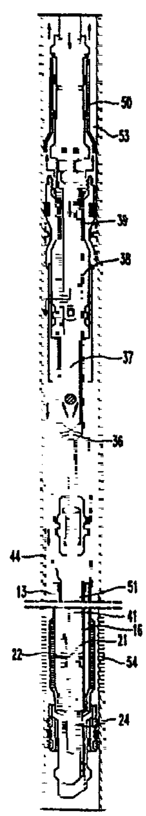
Primary Examiner—Hoang C. Dang
Attorney, Agent, or Firm—Woodard, Emhardt, Naughton, Moriarty & McNett

[57] **ABSTRACT**

An isolation system is disclosed which includes a production screen and an internal isolation pipe sealed with the production screen at proximal and distal ends, and an internal sleeve slidably coupled with the isolation pipe. The isolation pipe defines at least one port and the sleeve defines at least one aperture, and the sleeve is moveable between an open position in which the port and aperture are in communication to permit fluid flow therethrough, and a closed position in which the port and aperture are not in communication and fluid flow is prevented. The sleeve is manipulated by a service string and multi-action shifting tool between the opened and closed positions. Also disclosed is a gravel packer and method of operation incorporating the isolation system, as well as a service tool and service string assembly useful therewith.

12 Claims, 4 Drawing Sheets



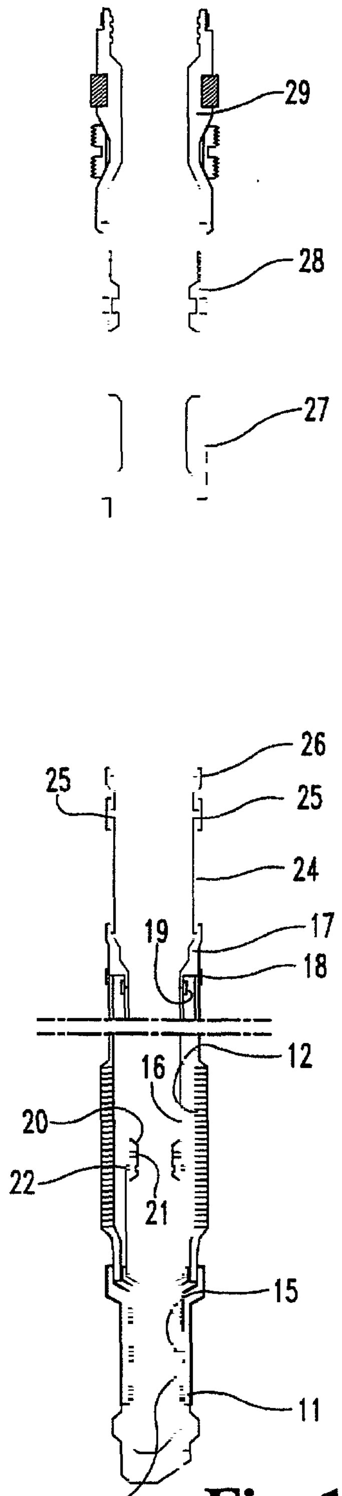

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Fig. 1

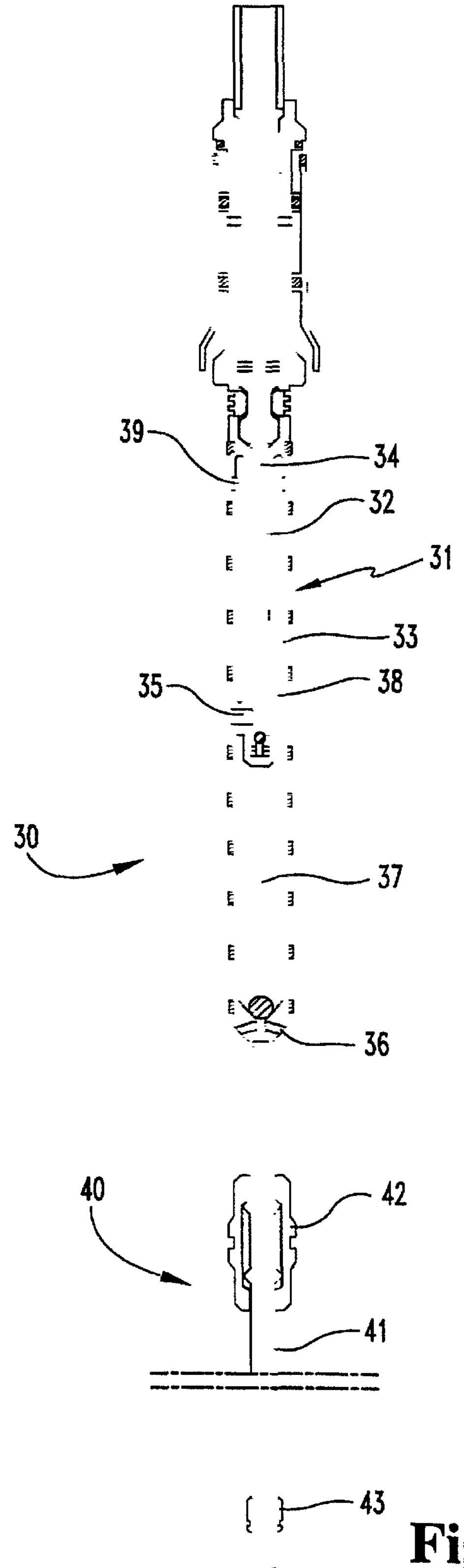
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Fig. 2

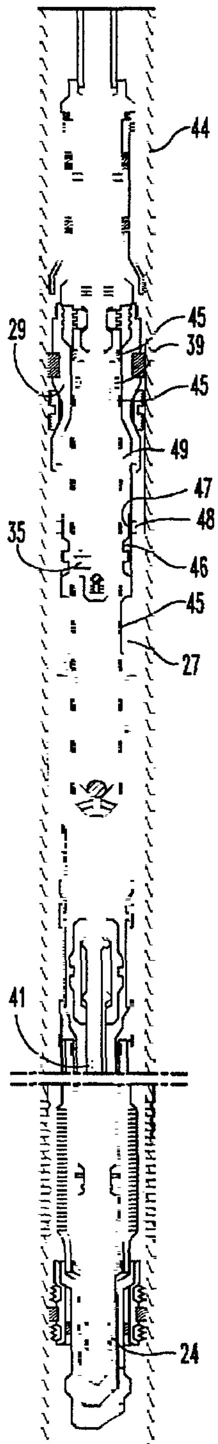

Fig. 3

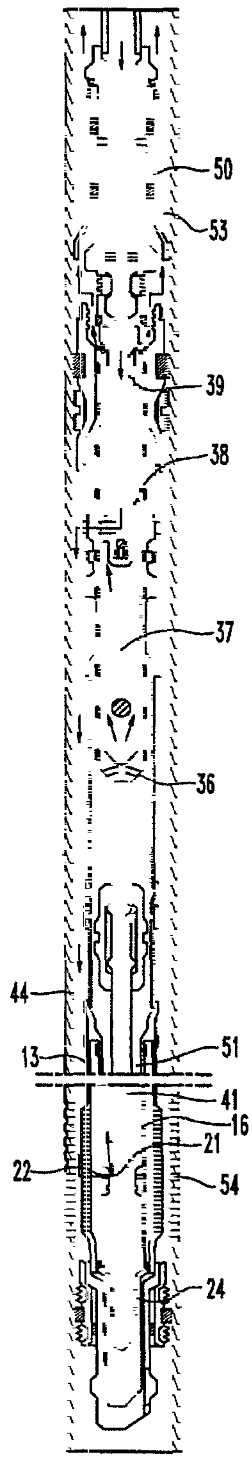

Fig. 4

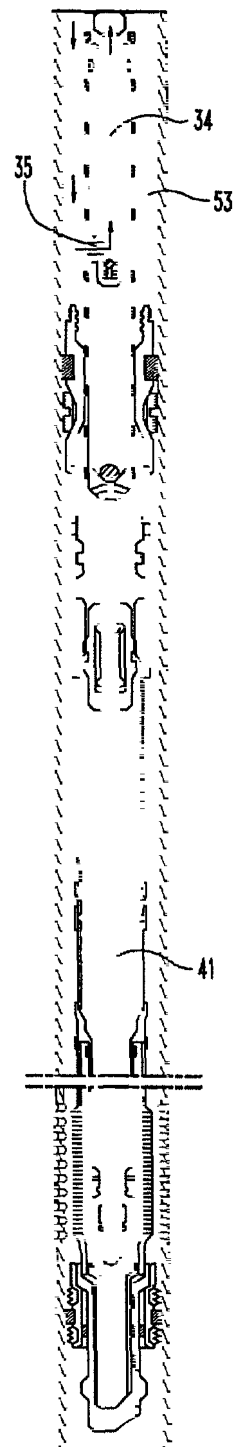

Fig. 5

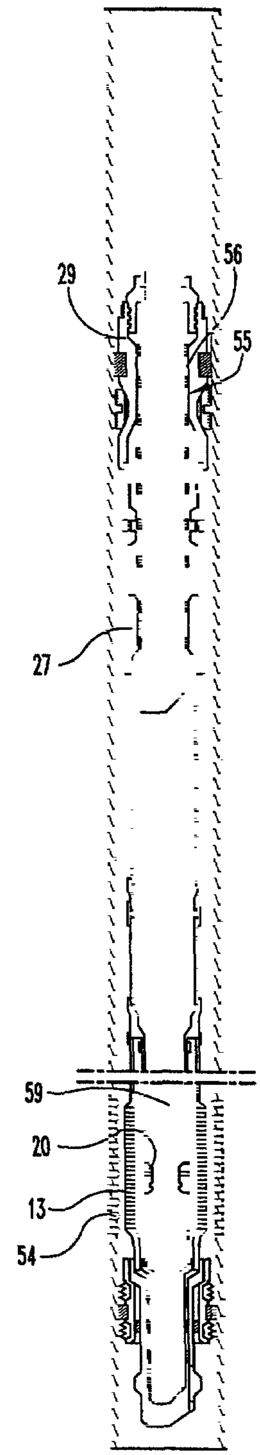

Fig. 6

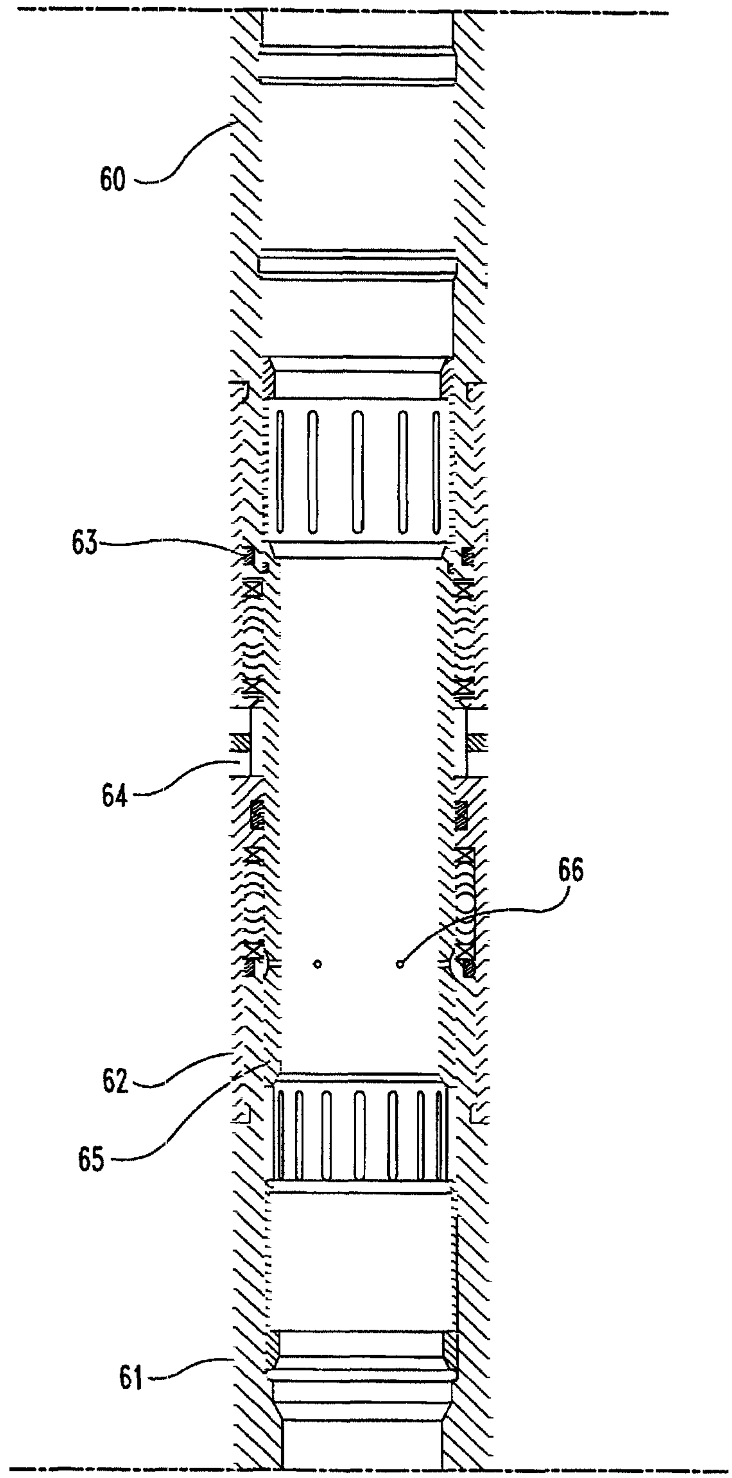

Fig. 7

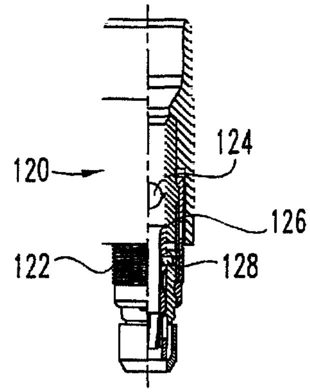

Fig. 9

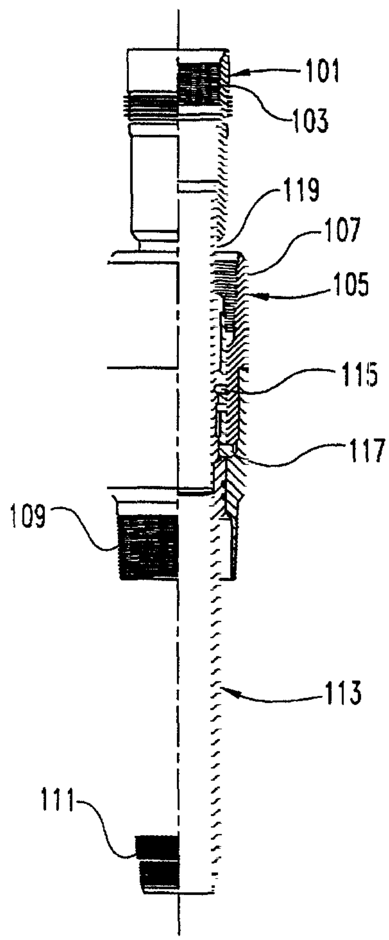

Fig. 8

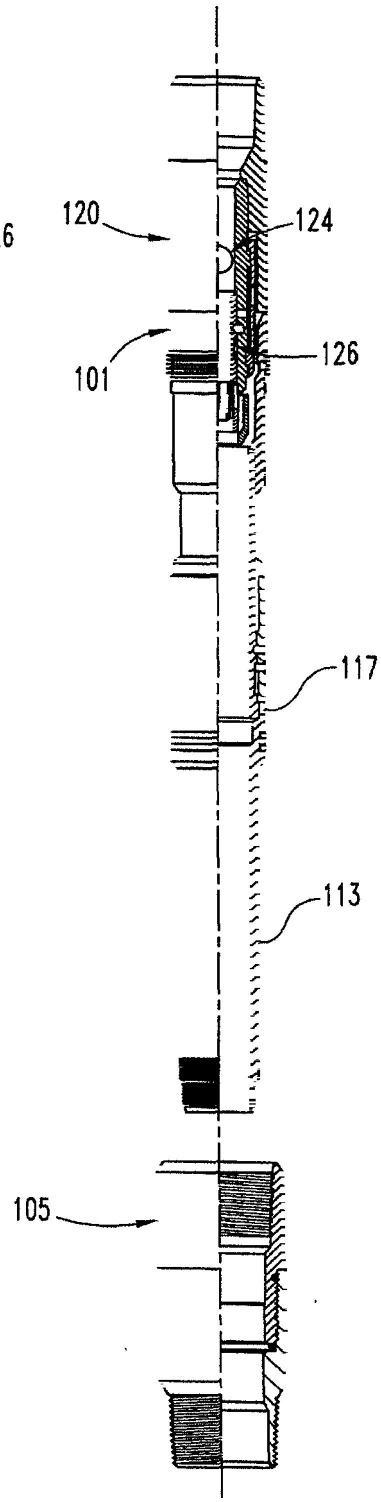

Fig. 10

ISOLATION SYSTEM AND GRAVEL PACK ASSEMBLY AND USES THEREOF

This is a continuation-in-part of Ser. No. 368,964, filed Jan. 5, 1995, now U.S. Pat. No. 5,609,204, issued Mar. 11, 1997.

BACKGROUND OF THE INVENTION

1 . Field of the Invention

The present invention relates to the field of isolation systems and gravel pack assemblies for use in a wellbore. More particularly, the invention provides an improved system and method for zone isolation following gravel pack completions installed in a wellbore.

2. Description of the Prior Art

The present invention provides an isolation sleeve which is installed inside the production screen at the surface and thereafter controlled in the wellbore by means of an inner service string. In contrast, the prior art has used systems which involve intricate positioning of tools which are installed down-hole after the gravel pack.

These systems are exemplified by a commercial system available from Baker. This system utilizes an anchor assembly which is run into the wellbore after the gravel pack. The anchor assembly is released by a shearing action, and subsequently latched into position.

Certain disadvantages have been identified with the systems of the prior art. For example, prior conventional isolation systems have had to be installed after the gravel pack, thus requiring greater time and extra trips to install the isolation assemblies. Also, prior systems have involved the use of fluid loss control pills after gravel pack installation, and have required the use of thru-tubing perforation or mechanical opening of a wireline sliding sleeve to access alternate or primary producing zones. In addition, the installation of prior systems within the wellbore require more time consuming methods with less flexibility and reliability than a system which is installed at the surface.

There has therefore remained a need for an isolation system for well control purposes and for wellbore fluid loss control which combines simplicity, reliability, safety and economy, while also affording flexibility in use. The present invention satisfies this need, providing an isolation system which does not require the running of tailpipe and isolation tubing separately. Instead, the present system uses the same pipe to serve both functions: as tailpipe for circulating-style treatments and as production/isolation tubing.

SUMMARY OF THE INVENTION

Briefly describing one aspect of the present invention, there is provided an isolation assembly which comprises a production screen, an isolation pipe mounted to the interior of the production screen, the isolation pipe being sealed with the production screen at proximal and distal ends, and a sleeve movably coupled with the isolation pipe, the isolation pipe defining at least one port and the sleeve defining at least one aperture, the sleeve having an open position with the aperture of the sleeve in fluid communication with the port in the isolation pipe, the sleeve in the open position permitting fluid passage between the exterior of the screen and the interior of the isolation pipe, the sleeve also having a closed position with the aperture of the sleeve not in fluid communication with the port of the isolation pipe, the sleeve in the closed position preventing fluid passage between the exterior of the screen and the interior of the isolation pipe. The

present invention also provides a complementary service string and shifting tool useful in combination with the isolation system. In a further embodiment there is provided an overall isolation and production screen assembly in combination with a gravel packer assembly. In still a further embodiment of the present invention, the isolation assembly is provided with a retrievable head selectively coupling the isolation pipe with the upper end of the blank pipe of the production screen assembly. Furthermore, a complimentary retrieving tool is disclosed for removing the retrievable head and isolation pipe assembly when necessary. In addition, the present invention contemplates methods for use of the foregoing assemblies in a wellbore.

It is an object of the present invention to provide a versatile isolation system that combines simplicity, reliability, safety and economy with optional methods of operation.

Another object of the present invention is to provide an isolation system permanently installed inside the production screen at surface prior to running into the well.

It is a further object to provide an isolation system which is simpler to install and operate, and which provides an immediate shut off to the zone of interest, allowing better means for fluid loss and pressure control.

Still a further object of the invention is that the isolation assembly can be retrieved without removal of the entire gravel pack assembly.

Further objects of the present invention include the provisions of an overall isolation and production screen assembly in combination with a gravel packer assembly, as well as a complementary service tool and service string assembly, and methods for the use thereof to provide a system having improved utility over the prior art.

Further objects and advantages of the present invention will be apparent from the description of the preferred embodiment which follows.

BRIEF DESCRIPTION OF THE DRAWINGS

FIG. **1** is a side, cross-sectional, diagrammatic view of an isolation system and gravel pack assembly in accordance with the present invention.

FIG. **2** is a side, cross-sectional, diagrammatic view of a service tool and service string assembly useful with the present invention.

FIG. **3** is a side, cross-sectional, diagrammatic view of the isolation and gravel pack assembly and of the service tool and service string assembly in the squeezing position.

FIG. **4** is a side, cross-sectional, diagrammatic view of the isolation and gravel pack assembly and of the service tool and service string assembly in the circulating position.

FIG. **5** is a side, cross-sectional, diagrammatic view of the isolation and gravel pack assembly and of the service tool and service string assembly in the reversing position.

FIG. **6** is a side, cross-sectional, diagrammatic view of the isolation and gravel pack assembly with the service tool and service string assembly removed and with a production assembly inserted for operation in the production position.

FIG. **7** is a side, cross-sectional view of an alternate form of an isolation system useful in accordance with the present invention.

FIG. **8** is a partial side, cross-sectional diagrammatic view of a retrievable isolation assembly head according to another embodiment of the invention.

FIG. **9** is a partial side, cross-sectional diagrammatic view of an isolation assembly head retrieval tool adapted to cooperate with the retrievable head of FIG. **7**.

FIG. **10** is a partial side, cross-sectional diagrammatic view of the retrieval tool of FIG. **8** engaged with the isolation assembly head of FIG. **7**.

DESCRIPTION OF THE PREFERRED EMBODIMENT

For the purposes of promoting an understanding of the principles of the invention, reference will now be made to the embodiment illustrated in the drawings and specific language will be used to describe the same. It will nevertheless be understood that no limitation of the scope of the invention is thereby intended, such alterations and further modifications in the illustrated device, and such further applications of the principles of the invention as illustrated therein being contemplated as would normally occur to one skilled in the art to which the invention relates.

In accordance with the present invention, an isolation system is provided which is installed prior to running the system into the wellbore. This yields a simpler and easier installation with advantages also in respect to the subsequent operation of the system. A valve system is mounted within the production screen and forms an integral part of the gravel pack assembly, thereby avoiding the need for a separate isolation system to be run separately into the well.

In the preferred embodiment, an isolation pipe and sliding valve sleeve are permanently coupled with the production screen at surface prior to running into the well. For normal operations, the isolation valve is initially fixed in the open position. When the gravel pack procedure is complete, an inner service string is manipulated to close the valve prior to pulling the gravel pack service tools from the wellbore. The isolation pipe assembly can be positively tested to insure integrity when required, and subsequent manipulation of the isolation sleeve permits the zone to be selectively opened or closed.

The isolation system of the present invention is useful in connection with conventional gravel packer systems. In general, the system comprises a combination of an isolation system mounted within a production screen. The isolation system is sealed at the proximal and distal ends of the production screen and provides a valving action such that shutting off the isolation system prevents fluid communication from the exterior of the production screen to the interior of the isolation system. The isolation system may therefore be configured in a variety of ways to accomplish this valving action. One such isolation system useful in accordance with the present invention is known as the Reservoir Isolation Valve or R.I.V., available from Tube-Alloy Corporation.

In FIGS. **1–6** there is provided a diagrammatic view of an embodiment of the present invention. FIG. **1** shows an improved isolation/screen assembly **10** in accordance with the present invention incorporated into an overall gravel packer assembly. In this embodiment, the isolation assembly **10** includes a locater seal **11** with an exterior concentric seal assembly. The seal is threaded to a production screen **12**, which is typically coupled to a section of blank pipe **13**.

Received within the seal **11** is a collet **14** having external, concentric seal assemblies **15** providing a fluid tight seal with the seal **11** at the distal end of the isolation/screen assembly. Collet **14** is threaded to an isolation pipe **16**. Blank pipe **13** and isolation pipe **16** are in turn secured to a coupling **17** by means of collars **18** and **19**, respectively, threaded to the coupling. Therefore, the isolation pipe is sealed on both the proximal and distal sides of the production screen, and fluid communication from the exterior of the production screen to the interior of the isolation pipe is controlled by the isolation pipe.

Shown somewhat in diagrammatic form in the figures is a valve member or sleeve **20** which is received within and movably mounted to the isolation pipe **16**. Sleeve **20** defines at least one aperture **21** which is alignable with one or more ports **22** in the isolation pipe, thereby providing fluid communication therewith when the aperture **21** is aligned with port(s) **22**. The sleeve **20** has an open position with aperture **21** in fluid communication with the port **22**, permitting fluid to pass from exterior of the screen **12** to interior of the isolation pipe **16**. The sleeve also has a closed position in which the aperture **21** is not in fluid communication with a port **22**. The closed position of the sleeve combines with the proximal end connections at coupling **17** and the distal end sealing by the seal assemblies **15** to prevent fluid communication from exterior of the screen to interior of the isolation pipe.

In typical use, the isolation/screen system is incorporated in an overall gravel packing assembly **23**, also shown in FIG. **1**. The coupling **17** is threadedly coupled through blank pipe **24** and collar **25** to a shearout safety joint **26**. This joint is in turn coupled by threaded engagement to a lower seal bore **27**, perforated extension **28** and gravel packer **29**. In conventional fashion, the gravel packer **29** includes a threaded proximal end for reception of a complementary hydraulic setting tool (FIG. **4**).

Useful with the isolation system and gravel packing assembly of the present invention is the service tool and service string assembly **30** shown in FIG. **2**. The overall service tool/string assembly includes a crossover assembly **31**. The crossover assembly provides control of fluid flow paths in cooperation with other components inserted into the wellbore. The crossover assembly includes an inner pipe **32** which extends for a portion of the proximal part of an outer pipe **33**. Inner pipe **32** defines a central lumen **34** which communicates through aperture **35** to the exterior of outer pipe **33** at a location intermediate the length of the outer pipe. In addition, outer pipe **33** defines a plurality of apertures **36** which communicate from the exterior of the outer pipe at its distal end to an interior chamber **37**, which in turn communicates through an annular portion **38** and holes **39** to the exterior of the outer pipe at its proximal end.

Extending distally from the crossover assembly is a service string **40** which operates in cooperation with the isolation system. The service string **40** includes a cylindrical member **41** which carries a position indicator **42** and a multi-action shifting tool **43**. The position indicator **42** works in conjunction with the lower seal bore **27** (FIG. **1**) and is useful for indicating the position of the shifting tool **43**. The shifting tool is used with the sleeve **20** on the isolation pipe **16** to move the sleeve between opened and closed positions, as described hereafter.

The isolation and gravel pack assembly and the service tool/string assembly are assembled using conventional techniques, and are used in combination to establish a wellbore gravel pack system having enhanced operating capabilities. The overall system is operable in several different modes, including squeezing, circulating, reversing and production, as described hereafter. It is a particular advantage of the present invention that the isolation system is permanently attached with the production screen, and that means are provided for readily switching from a closed, isolation condition to an open, production condition.

Given the foregoing description of the novel isolation system and associated components, the assembly of the various assemblies will be within the ordinary skill in the art. Therefore, only a brief summary of the assembly process is provided hereafter.

In a preferred method, the system is inserted in typical fashion into a wellbore defined by casing 44 (FIG. 3). In the assembly process, the assembly **11**, for example a bull-plug or latch type seal assembly for a sump packer, is made up to the bottom of a sand control production screen **12** designed for the size and weight casing **44** in which the assembly is to be installed. Most assemblies will be run until one joint of blank pipe **13** is above the production screen. As is well understood, the assembly of these and other components is typically by screw threading of the components, such as by connection of the production screen **12** with blank pipe **13**.

At this point, the packing assembly is positioned on the rotary table and it is ready for installation of the isolation assembly. In the embodiment of FIGS. **1–6**, the isolation assembly consists of the collet **14** and concentric seal assemblies **15** attached to the isolation pipe **16**. This isolation pipe in turn carries the isolation sleeve **20**, initially in the opened position. The isolation assembly is permanently installed into the production screen and blank pipe assembly at the surface of the well. Remaining blank pipe is installed as needed until the gravel pack packer assembly is ready to be installed thereon.

Once the blank pipe is installed, then the multi-action shifting tool **43** is made up on the bottom of the service string **40** and run inside the production screen/blank pipe and inside the fixed isolation assembly. The shifting tool **43** is positioned below the isolation sleeve **20** during installation of the gravel packer.

The service tool/string is then made up to the internal service string and lowered to mate up with the screen/blank pipe assembly **10**. The entire gravel pack assembly is mated up with the rig work string and lowered into the wellbore for installation. Typical packer setting and gravel pack procedures are followed until the operator is ready to remove the gravel pack service tool and service string from the wellbore.

The packer is seated using pump pressure applied to the tubing. After the packing is seated, the crossover assembly may be opened and closed as desired to control fluid flow. With the crossover assembly closed, the packer may be pressure tested by pumping down the casing. Pumping down the tubing and into the formation is done to establish injection rate. With the crossover assembly open, a sand slurry may be circulated to place sand outside the screen and into the formation until an adequate gravel pack is obtained. If desired, the crossover may be closed to obtain a conventional squeeze pack.

The initial assembly of the systems and the placement in the wellbore provides a squeezing position as shown in FIG. **3**. The crossover assembly carries a series of concentric seals **45** which are operable to seal with the interior of the lower seal bore **27** and locations along the interior of the gravel packer **29**. In the position of FIG. **3**, the crossover assembly is located to seal with the lower seal bore **27**, and also to seal with the gravel packer **29** on both sides of holes **39**. A closing sleeve **46** is mounted to the perforated extension **28** and includes apertures **47** which may be moved into and out of alignment with perforations **48** in the extension.

In the squeezing position, the closing sleeve is in the open position with the apertures **47** aligned with the perforations **48**. Therefore, fluid pumped through the central lumen **34** can move through aperture **35** into an annular cavity **49**. The fluid then may pass through apertures **47** and perforations **48** to the space between the packer assembly and casing.

A circulating condition is established when the gravel pack service tool is displaced upwardly, as shown in FIG. **4**. A hydraulic setting tool **50** is used in conventional fashion to separate the service tool **31** from the gravel packer **29** and the service tool is displaced upwardly to the position of FIG. **4**. In this position, the holes **39** are not sealed with the gravel packer, and fluid is free to flow outwardly through the holes **39** to the area along the casing interior above the gravel packer. In this circulating position, fluid may be forced downwardly through the central lumen **34** and along the route described with respect to the squeezing position of FIG. **3**. However, since the holes **39** are not sealed, fluid can travel through the annular space **51** between the service string and the isolation pipe and through the interior chamber **37** and eventually through the holes **39** to the region above the gravel packer. In particular, fluid passes down through the annular space **52** between the blank pipe **13** and the casing **44** and passes successively through the screen **12**, port **22** and aperture **21** to the annular space **51**. The fluid then moves upwardly past the location indicator **42** and through apertures **36** into the interior chamber **37**. From here the fluid flows through the annular portion **38** and out the holes **39** into the annular region **53** outside and above the hydraulic setting tool **50**.

It will be appreciated that the circulating position is useful for delivering wellbore fluids, i.e. completion fluids, and sand down to the region of the production screen **12** and the perforations **54** in the casing. As is conventional, a sand slurry is delivered in an amount to fill the area outside the screen, and to some extent outside the casing, up to a level at least slightly above the top of the production screen. If desired, the crossover may be closed (FIG. **3**) to obtain a conventional squeeze pack.

The circulating operation is distinguished from the prior art in that the circulation pattern is not through the interior of the service string **41**. In the past, the lower part of the service string has comprised a hollow wash pipe. In the circulating position, the distal end of the wash pipe has been located above the sump packer, generally in the region of the production screen. In this configuration, fluid flow in the circulating position has occurred upwardly through the interior of the wash pipe. In contrast, the present invention utilizes a circulating flow pattern in which the fluid passes through the annular space **51** between the service string **41** and the isolation pipe **16**. Consequently, the radially extending apertures **36** provide for fluid communication from this annular space **51** to the interior chamber **37**.

A reversing position is shown in FIG. **5**. In this condition, fluid is able to flow through the aperture **35** between the central lumen **34** and the annular region **53**. This position is useful for removing excess sand slurry and completion fluids from the aperture **35** and the central lumen **34** of the crossover assembly. This provides protection for the formation from circulation pressure and possible loss of completion fluid.

After removal of the service tool and service string, a production seal assembly is run in for production of the zone. As the service string **40** is removed from the wellbore, the shifting tool **43** automatically moves the sleeve **20** to the closed position. This isolates the production zone during the time that the production seal assembly is being run into the well. As shown in FIG. **6**, the production seal assembly **55** includes production tubing **56** which carries concentric seal assemblies **57**. The seal assemblies provide a fluid tight seal between the production tubing and the lower seal bore **27** and packer **29**.

Once the production seal assembly is in position as shown in FIG. **6**, a service string or wireline is run into the wellbore to shift the sleeve **20** to the open position (as shown, for example, in FIG. **4**). The well is then in condition for production from the zone. In particular, material moves through the perforations **54** in the casing, through the production screen **12** and the aligned ports **22** and apertures **21** into the central passageway **59**. The material then moves upwardly through the interior of the production tubing **56**.

Thereafter, the isolation assembly may be used to selectively open and close the production zone as required. A service string with multi-action shifting tool is used to selectively raise (close) or lower (open) the sleeve **20** relative the isolation pipe **16**.

In another embodiment of the invention, the isolation assembly may be removed from the gravel pack assembly without retrieving the entire assembly from the well hole. Referring to FIG. **8**, an alternative to coupling **17** of FIG. **1** is shown having outer housing **105** which selectively engages isolation head **101**. Although not shown in FIG. **8**, it will be understood by those skilled in the art that the coupling assembly of FIG. **8** is substituted for coupling **17** in FIG. **1**, as such, outer housing **105** is coupled with blank pipe **24** (not shown) by internal threads **107** and with blank pipe **13** (not shown) by external threads **109**. The position of isolation head **101** is maintained within outer housing **105** by lug **117** which is received within outer housing **105**. Isolation head **101** includes upper mandrel **119** slidably engaging lower mandrel **113** and maintained in a constant position by shear pin **115**. Upon shearing of shear pin **115**, upper mandrel **119** is free to move upwardly a fixed distance, thereby allowing lug **117** to move inwardly and disengage outer housing **105**. Isolation head **101** further includes a series of external threads **111** on the lower end and internal threads **103** on the upper end, which provide an attachment point for the remainder of the isolation assembly (not shown) as previously disclosed in FIG. **1**.

Retrieving tool **120** shown in FIG. **9** is cooperable with isolation head **101** to permit removal of the isolation assembly from the gravel packing assembly after installation in the wellbore. Retrieval tool **120** includes a series of external threads **122** adjacent its lower end for engaging internal threads **103** of isolation head **101**. For disengaging retrieval tool **120** from isolation head **101**, a slidable ball seal **126** held in place by shear pins **128** is provided within the retrieval tool. As will be understood by those skilled in the art, ball **124** seats on ball seat **126** and upon application of sufficient force shear pins **128** give way permitting ball seat **126** to shift downwardly, thereby allowing retrieval tool **120** to be disengaged from isolation head **101**.

FIG. **10** shows retrieval tool **120** engaged with isolation head **101** and the isolation head disengaged from outer housing **105**. As shown in FIG. **10**, upper mandrel **119** has been shifted upwardly with respect to lower mandrel **113**, thereby allowing lug **117** to move inwardly and disengage housing **105**. Thus, the isolation assembly may be withdrawn from housing **105**.

In operation, the gravel packing and isolation assembly is assembled with retrievable isolation head **101** and outer housing **105** interconnected in place of coupling **17** when assembling components of the isolation and gravel pack assembly of FIG. **1**. Internal threads **107** and external threads **109** threadedly engage blank pipe **24** and blank pipe **13** of FIG. **1**, respectively. External threads **111** engage isolation pipe **16**. The entire assembly is run into the wellbore and utilized as with the previously disclosed embodiment. Should there be a need to remove the isolation assembly, isolation retrieval tool **120** is mated to a tool string at the surface in a conventional manner. The tool string with attached retrieval tool **120** is run into the wellbore until retrieval tool **120** is adjacent isolation head **101**. Once in contact, retrieval tool **120** is forced downward, thereby ratcheting threads **103** into engagement with threads **122** until the connection is completed. In a preferred embodiment 5,000 to 10,000 lbs. of set down weight is applied to the tool string to make the connection between retrieval head **120** and isolation head **101**. Once retrieval tool **120** is securely attached to isolation head **101**, the tool string is pulled upward, thereby shearing shear pins **115**. In a preferred embodiment, shear pins **115** shear at approximately 18,000 pounds. Although this type of pin is used in the present embodiment, it is contemplated that any shear pin strength could be utilized that would provide the proper stability during use and shearability for removal. Shearing of pins **115** allows upward movement of isolation head **101** and upper mandrel **119** which permits lug **117** to disengage outer housing **105**. Once lugs **117** have disengaged, the entire isolation assembly is then free to be removed from housing **105** by continuous upper movement of the tool string.

In the event the isolation assembly cannot be freed after retrieval tool **120** has engaged isolation head **101**, retrieval tool **120** can be disengaged from the isolation head. One such method utilized with a preferred embodiment is to hydraulically release the retrieval tool. To hydraulically release retrieval tool **120** from isolation head **101**, ball **124** is dropped from the surface until it is seated on ball seat **126**. In the preferred embodiment, this is a steel ball that is allowed to gravitate to the ball seat. However, other arrangements are contemplated. Once ball **124** is on ball seat **126**, the work string is pressured up to shear shear pin **128**, which thereby allows downward movement of ball seat **126** and thus releases retrieving tool **120** from the isolation string. In the preferred embodiment, it is contemplated that the pressure required to shear shear pin **128** is 2,200 psi. However, depending on the conditions and characteristics desired, other shear pin strengths could be utilized and still fall within the spirit of this invention.

As an alternative to a hydraulic release, the retrieval tool **120** can be rotated a sufficient number of turns to disengage the threaded connection of isolation head **101**. In the preferred embodiment, this is accomplished in approximately eight turns to the right. However, it is contemplated that there could be more or less turns required to disengage the threaded coupling depending on the number of threads utilized.

It will be appreciated that the foregoing description relates to a somewhat simplified and diagrammatic view of the isolation system and related components. As is well understood in the art, these components may include a multiplicity of members interconnected in conventional fashion, e.g. by threaded connection. For example, items shown as a single pipe may comprise several pipes connected together with threaded couplings to provide an overall member of desired length.

Similarly, the particular configuration of the isolation/production screen assembly can vary. A particular aspect of the assembly being that the isolation system is secured to the production screen and sealed both proximally and distally of the screen. As mentioned, a convenient isolation system for use with the present invention is available commercially as the Reservoir Isolation Valve, or R.I.V. An R.I.V. is shown in FIG. **7**. The R.I.V. assembly **60** comprises top and bottom pipes **61** and **62** coupled together by cylindrical body **63** through threaded connections and sealed therewith by O-ring seals **64**. The body **63** defines holes **65** in communication with the exterior of the assembly. A sleeve **66** is received within the assembly and defines several ports **66**. The sleeve has an open position in which the ports **66** are in fluid communication with the holes **64**, and a closed position in which the ports are not in communication.

The present invention provides an isolation system and method which has distinct advantages. The system permits the installation of as many independent zone isolation systems as necessary, without restrictions to production. Gravel packing can be accomplished with the isolation tubing in place. Access to the zone is permitted by simple activation of the isolation sleeve by means of a service string. In addition, the integrity of the isolation assembly can be pressure tested prior to coming out of the wellbore with the service tools.

The shut off of wellbore fluids into the producing zone is accomplished by way of a permanent isolation assembly. Pressure depleted zones can be isolated immediately after gravel pack installation. In multiple zone completions, higher pressure zones can similarly be isolated immediately after gravel pack installation.

In practice, the system avoids the need for prior conventional isolation strings that had to be installed after the gravel pack, thereby eliminating complex space outs, and the extra trips to install isolation assemblies. The system eliminates fluid loss control pills after gravel pack installation. The system also eliminates the need to thru-tubing perforate to access alternate or primary producing zones, while thru-tubing perforation is available as a back-up.

While the invention has been illustrated and described in detail in the drawings and foregoing description, the same is to be considered as illustrative and not restrictive in character, it being understood that only the preferred embodiment has been shown and described and that all changes and modifications that come within the spirit of the invention are desired to be protected.

What is claimed is:

1. A gravel packing and isolation assembly with complementary crossover assembly which comprises:

a gravel packing assembly including a production screen assembly having a proximal end and a distal end, said screen defining an area of fluid passage between a screen interior and a screen exterior;

an isolation pipe defining at least one port therethrough, said isolation pipe having a proximal end and a distal end, at least one of the proximal and distal ends being affixed to said production screen assembly;

first sealing means for sealing the proximal end of said isolation pipe with said production screen assembly;

second sealing means for sealing the distal end of said isolation pipe with said production screen assembly; and

an isolation valve comprising a sleeve movably coupled with said isolation pipe, said sleeve defining at least one aperture, said sleeve having an open position with the aperture of said sleeve in fluid communication with the port in said isolation pipe, said sleeve having a closed position with the aperture of said sleeve not in fluid communication with the port of said isolation pipe, said sleeve in the open position permitting fluid passage between the exterior of said screen assembly and the interior of said isolation pipe, said sleeve in the closed position preventing fluid passage between the exterior of said screen assembly and the interior of said isolation pipe;

a crossover assembly having a distal end and further having an exterior surface configured to selectively engage said gravel packing assembly for creating selective flow paths to accomplish gravel packing of a well production zone said crossover assembly releasably connected to said gravel packing assembly;

a service string attached to said distal end of said crossover assembly; and

a shifting tool attached to said service string, said shifting tool being operable for selectively engaging and positioning the sleeve of said isolation valve.

2. The apparatus of claim **1** wherein said first sealing means and said second sealing means releasably engage said isolation pipe thereby permitting removal of said isolation pipe.

3. The apparatus of claim **1** wherein said isolation pipe further includes an isolation head configured to be engaged by a retrieval tool, said isolation head releasably engaged by said first sealing means.

4. A combination gravel packing and isolation apparatus with complementary crossover assembly which comprises:

a gravel packing assembly having an inner bore and an exterior surface, said gravel packing assembly having at least one aperture from said inner bore to said exterior surface;

a production screen attached to said exterior surface covering said at least one aperture;

an isolation valve connected to the inner bore at said gravel packing assembly adjacent said production screen, said isolation valve controllable between an open position permitting fluid flow through said screen and a closed position inhibiting fluid flow through said screen;

a crossover assembly in selective fluid communication with the inner bore of said gravel packing assembly and the annulus between said gravel packing assembly and said well bore, said crossover assembly releasably connected to said gravel packing assembly; and

means for controlling the position of said isolation valve, said means being attached to said crossover assembly.

5. The apparatus of claim **4** wherein said crossover assembly has a distal end and further includes a service string attached to the distal end of said crossover assembly, said means for controlling being located on said service string.

6. The apparatus of claim **5** wherein said means for controlling the position of said isolation valve comprises a shifting tool connected to said service string.

7. A method for gravel packing and isolating a production zone within a wellbore on a single trip of a tool string into the wellbore, said method comprising the steps of:

(a) running into the wellbore a tool string comprising a packer assembly having a production screen with a production screen isolation valve disposed interior of the screen and a crossover assembly having an open bore therethrough and having a shifting tool on the distal end, the crossover assembly being selectively operable to provide: (i) a first flow path from the interior of the tool string at a location above the packer assembly to the annulus between the tool string and the wellbore below the packer assembly and (ii) a second flow path from the interior of the tool string below the packer assembly to the annulus between the tool string and the wellbore above the packer assembly, the shifting tool being operable with the isolation valve to control fluid flow through the production screen;

(b) sealingly engaging the packer assembly to the wellbore adjacent the desired production zone for maintaining the position of the packer assembly and sealing the annulus between the packer assembly and the wellbore;

(c) selectively operating the crossover assembly to establish the first fluid flow path and the second fluid flow path, thereby creating circulation from the annulus through the production screen;

(d) injecting a gravel slurry through the tool string to the crossover assembly and thereby gravel packing the annulus outside the production screen;

(e) selectively operating the crossover assembly to close the production screen isolation valve with the shifting tool; and

(f) withdrawing the crossover assembly from the gravel packing assembly.

8. The method of claim **7** wherein step (a) further includes step (iii) a third flow path from the annulus between the tool string and the wellbore above the packer to the interior of the tool string above the packer; and

further including the step of selectively operating the crossover assembly to shut off the first and second fluid flow paths and to establish the third fluid flow path, thereby reversing flow through the tool string and removing excess sand slurry from the tool string.

9. The method of claim **7** wherein said step (e) is performed by withdrawing the crossover assembly from the gravel packing assembly.

10. A method for gravel packing and isolating a well production zone, the method comprising the steps of:

(a) interconnecting a gravel packer with an isolation assembly having a controllable isolation valve for controlling flow through a production screen;

(b) releasably attaching the gravel packer and isolation assembly to a crossover assembly having a service string extension with shifting tool;

(c) inserting into a wellbore a tool string including the interconnected gravel packer and isolation assembly and releasably attached crossover assembly;

(d) setting the gravel packer adjacent the well production zone;

(e) releasing the crossover assembly from the gravel packer;

(f) performing a gravel packing procedure;

(g) selectively positioning the isolation valve to the desired position with the shifting tool; and

(h) removing the crossover assembly from the well bore leaving the gravel packer and isolation assembly within the well bore.

11. The method of claim **10** wherein said step of selectively positioning the isolation valve is performed by use of a shifting tool attached adjacent to a distal end of the service string extension.

12. The method of claim **10**, wherein said interconnecting the gravel packer and the isolation assembly is a releasable connection allowing removal of the isolation assembly from the gravel packer after deployment in the wellbore.

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