# Operator Log Tool (OLT)

## General Overview

May 26, 2014

# Outline

- Introduction / OLT Background
- Support Model
- OLT Community
- Request Process
- OLT Feature Usage across Suncor
- Common OLT Day in the Life (Site Dependent)
- Core Features
- Advanced Features
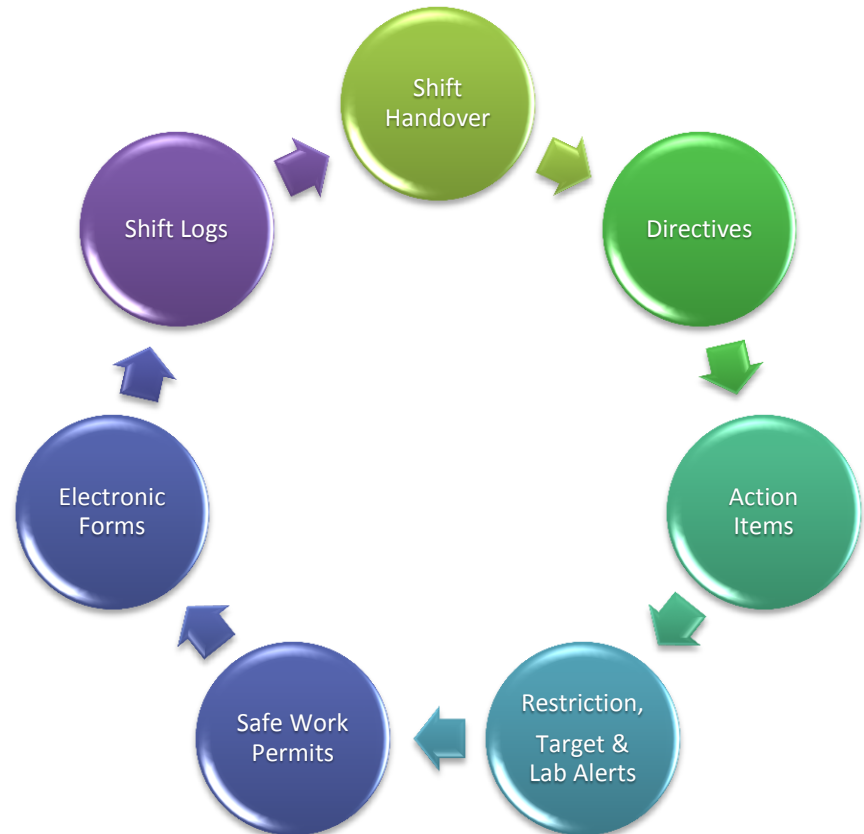- Technical Architecture

# Introduction

## Background

- Suncor built system, started in 2005.
- Used at 12 sites with over 3000 users.
- An Enterprise application with "Gold" level of support.

## Benefits

- Help to manage priorities, shift orders, and activities in a consistent manner.
- Improves communication and collaboration across groups.
- Provides situation awareness and safe operations.

## OLT Features



Shift Handover → Directives → Action Items → Restriction, Target & Lab Alerts → Safe Work Permits → Electronic Forms → Shift Logs → Shift Handover

# Support Model

## Help Desk

- 1st level support
  - Address common issues with OLT such as security access, installation, etc.
  - Triage more complicated issues to 2nd level support team.
- 24 x 7 availability
- Phone & email support

## IBM Sustainment

- 2nd level support
  - Address more complicated issues with the exception of issues requiring code changes or business domain knowledge
  - Responsible for the day to day sustainment of OLT
- 24 x 7 availability
- Engaged via Service Order

## OLT Team

- 3rd level support
  - Address complicated issues requiring code changes or business domain knowledge
  - Manage rollouts or enhancements of the software including design, development, training, and on site rollout support
- Available during business hours
- Engaged via RFS or by 2nd level support

**Tier 1**

**Tier 2**

**Tier 3**

# OLT Community

**Overview:**

- Formed to provide an efficient mechanism by which decisions affecting multiple sites using OLT can be made. Members are engaged as required to provide input on features and manage OLT development priorities when competing requests arise between sites.
- Encourages the sharing of best practice information as well as synergies in enhancement, training, and rollout requests.

**Roles:**

- OLT Team
  - Reports into Information Services Non SAP/Non Enterprise Operations.
  - Principally involved in the planning, training, management, & execution of all enhancements & site rollouts relating to OLT.
  - Provides third tier application support where necessary.

- OLT Site Representatives
  - A single business representative assigned from within each site using OLT to act as their point of contact.
  - Empowered to determine feature usage and ongoing strategy for their site's OLT implementation.
  - Approves system outages and significant changes in features used by their site.
  - Represents their site on the OLT Community.

- OLT Site Administrators
  - One or more business representatives assigned from within each site using OLT.
  - Often combined with the OLT Site Representative.
  - Role assigned to maximize availability across multiple shifts.
  - Provides day to day configuration support and acts as an on site Subject Matter Expert (SME) for the system.

# OLT Community – Cont'd

| Site | Group | Site Representative | Site Admin | ISBA |
|------|-------|---------------------|------------|------|
| Denver | Operations | Cornel Balea | Cornel Balea | Brion Baker |
| Edmonton | Operations | Krzysztof Tomaszewski or Chris Plaquin | Krzysztof Tomaszewski or Chris Plaquin | Geoff Noden |
| Firebag | Operations | Barry Beller | Jason Kiselewski or Bruce Buhr or Glen Welsh | Scott Ruth |
| MacKay River | Operations | Ben Van Rhyn | Ben Van Rhyn | Scott Ruth |
| Montreal | Operations | Daniel Thibault | Yves Larose | Gilbert Varja |
| Mississauga | Operations | Brian Richard | Brian Richard | Dan Evangelista |
| Oilsands | Operations – Extraction | Scott Dodds | Scott Dodds | Scott Ruth |
| Oilsands | Operations – Upgrading | Jeffery Riddle | Jeffery Riddle | Scott Ruth |
| Site Wide Services | Operations – Energy Services | Dennis Banks | Murray Mortlock | Scott Ruth |
| Site Wide Services | Operations – Transmission & Distribution | Dennis Banks | Murray Mortlock | Scott Ruth |
| Sarnia | Operations | Mike MacNeil or Rebecca Fitzjohn | Mike MacNeil or Rebecca Fitzjohn | Derek Robertson |
| Voyageur | Operations | Dennis Banks or Brad Kelly | Tina Ghashghe Joseph Moulton | Phil Hanoudi |

# OLT Requests Process

**Step 1 – Contact Site IS Business Advisor (ISBA)**

- Provides IS guidance for the business and is a resource to determine proper IS process, requirements and fit with the suite of solutions available in Suncor.
- Submits a Request For Service (RFS) if OLT is determined to be a potential solution.

**Step 2 – Initial Request Review**

- RFS reviewed by IBM Sustainment and acted upon if the request is related to 2nd tier support.
- RFS reviewed by OLT Team and acted upon if the request is related to OLT training, enhancements, rollouts.
  - Scoping workshop held to determine high level requirements.
  - Work must not consequently affect other sites without their approval , must not negatively affect the performance of OLT, and must fit within OLT's intended uses (fit for purpose).
  - Implementation estimate produced.

**Step 3 – Approve Estimate & Schedule Work**

- Estimate reviewed by business & OLT Site Owner/Admin and funding secured.
  - Cost sharing between OLT Community members encouraged where possible.
- Work scheduled in next available scheduled OLT release (~ every 2 months).
  - Priorities for conflicting work are addressed via the affected OLT Community members where possible.

**Step 4 – Execution**

- Gather detailed requirements with a representative group of site users.
- Configure, develop, and User Acceptance Test (UAT) OLT functionality as requested.
- Train OLT Site Administrators, Super Users, and Users.
- Rollout functionality as requested.

**RFS**

↓

**Estimate**

↓

**Approval**

↓

**OLT**

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# OLT Feature Usage Across Suncor

| Location | Active Users | Logs | Handovers | Action Items | Directives | Target Alerts | Restrictions | eSWPs | eForms |
|---|---|---|---|---|---|---|---|---|---|
| **Denver** | 452 | ✔ | ✔ | ✔ | ✔ | ✔ | | ✔ | |
| **Edmonton** | 467 | ✔ | ✔ | ✔ | ✔ | | | ✔ | ✔ |
| **Firebag** | 315 | ✔ | ✔ | ✔ | ✔ | | | | |
| **Lubes** | 162 | ✔ | ✔ | ✔ | ✔ | ✔ | | ✔ | |
| **McKay River** | 92 | ✔ | ✔ | ✔ | ✔ | | | | |
| **Montreal** | 385 | ✔ | ✔ | ✔ | ✔ | ✔ | | ✔ | |
| **Oilsands – EXT** | 946 | ✔ | ✔ | ✔ | ✔ | Partial | ✔ | | |
| **Oilsands – UPG** | | ✔ | ✔ | ✔ | ✔ | Partial | | | ✔ |
| **Oilsands – Lab** | | Q2 2014 | Q2 2014 | Q2 2014 | Q2 2014 | | | | |
| **SWS – EUS** | 155 | ✔ | ✔ | ✔ | ✔ | Partial | | | |
| **SWS – T&D** | | ✔ | ✔ | ✔ | ✔ | | | | |
| **Pipelines** | Q4 2014 | Q4 2014 | Q4 2014 | Q4 2014 | Q4 2014 | | | | |
| **Sarnia** | 324 | ✔ | ✔ | ✔ | ✔ | ✔ | | ✔ | |
| **Voyageur** | 45 | ✔ | ✔ | ✔ | ✔ | | | | |

Detailed Comparson Matrix Link

# Common OLT Day in the Life

| Operator / Console Technician | Lead Technician | Shift Supervisor |
|---|---|---|
| 1. Log in and select your **Work Assignment** | 1. Log in and select your **Work Assignment** | 1. Log in and select your **Work Assignment** |
| 2. Review<br>• Outgoing Technician **Handover** and **Mark as Read**<br>• **Daily Directives** and **Mark as Read** | 2. Review<br>• Outgoing shift supervisor **Handover** and **Mark as Read**<br>• **Daily Directives** and **Mark as Read** | 2. Review<br>• Outgoing shift supervisor **Handover** and **Mark as Read**<br>• **Daily Directives** and **Mark as Read** |
| 3. Update OLT throughout the day<br>• Review and Respond to **Action Items**<br>• Create / Update your **Shift Log** (may include Equipment Readings)<br>• Create / Update your **Handover** | 3. Update OLT throughout the day<br>• Create / Review **Action Items**<br>• Create / Update your **Shift Log** (may include lab results)<br>• Create / Update your **Handover** | 3. Update OLT throughout the day<br>• Create **Directives**<br>• Create / Review / Approve **Action Items**<br>• Create / Update your **Summary Log**<br>• Create / Update your **Handover** |
| 4. Review your **Handover** and present to next shift | 4. Review your **Handover** and present to next shift | 4. Review your **Handover** and present to next shift |

*Green* text indicates the OLT features to be used.

# Common OLT Day in the Life – Cont'd

| Area Manager / Logistics Coordinator / Process and Reliability Engineers | Operations Coordinator / Maintenance Coordinator | Read-only |
|---|---|---|
| 1. Log in and select your **Work Assignment** | 1. Log in and select your **Work Assignment** | 1. Log in and select your **Work Assignment** |
| 2. Review<br>  • Shift Supervisor **Handovers** in your area from the outgoing shift and **Mark as Read** | 2. Review<br>  • Shift supervisor **Handovers** in your area from the outgoing shift and **Mark as Read** | 2. Review<br>  • Shift Handovers<br>  • Actions Items<br>  • Shift Logs/Summary Logs |
| 3. Create / Review **Daily Directives** | 3. Create / Review **Daily Directives** | |
| 4. Create / Review **Action Items** | 4. Create / Review **Action Items** | |
| | 5. Update OLT throughout the day<br>  • Create / Update your **Shift Log** (ordering supplies , current state of equipment, etc.) | |

*Green* text indicates the OLT features to be used.

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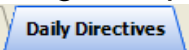
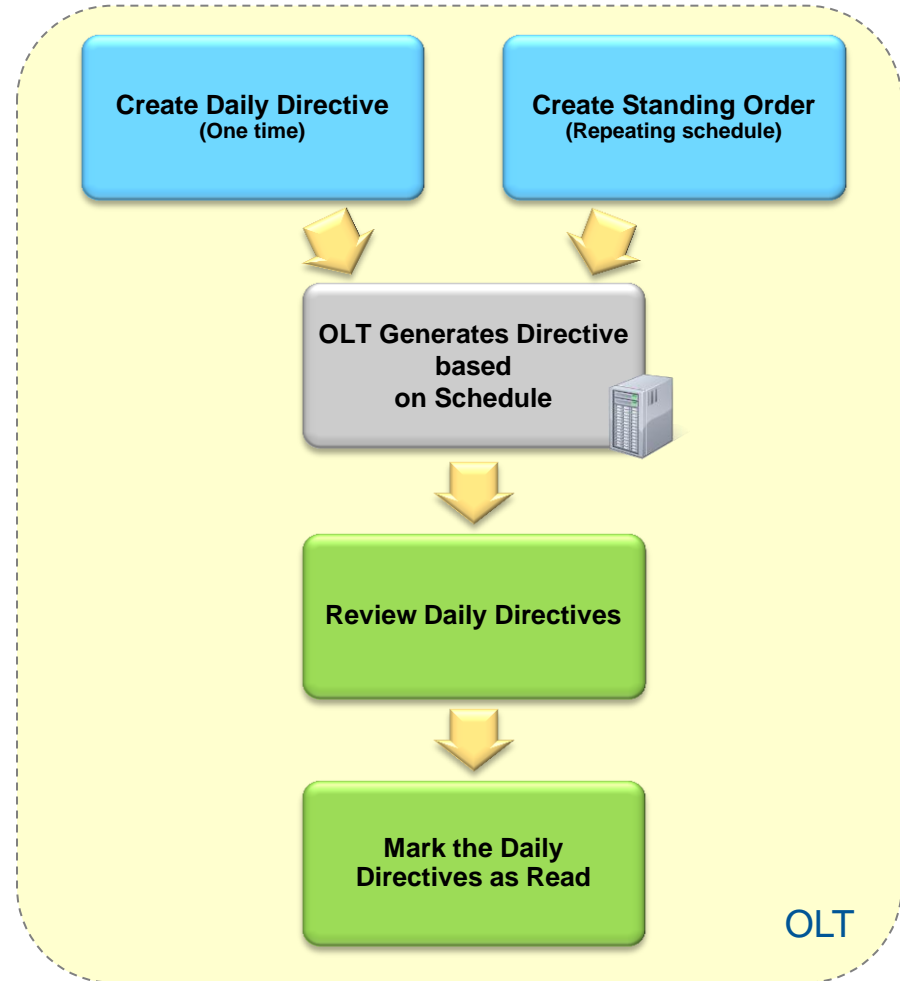# OLT Core Feature – Daily Directives

## What is a Daily Directives?

- Communicates information that an area should be aware of for the shift.
- Sent from management.
- Instructions can be schedule to occur on a repeating basis.
- Directives are created at the exact time specified.
- Standing Orders are repeating directives that are in effect over multiple days.

## How are Daily Directives accessed in OLT?

1. In the navigation pane click on 🖊.
2. Select Daily Directives tab.
3. Click on New ▾ button to create a new a Standing Order/Daily Directive.

- Or -

4. In the navigation pane click on.

**Create Daily Directive** (One time)

**Create Standing Order** (Repeating schedule)

**OLT Generates Directive based on Schedule**

**Review Daily Directives**

**Mark the Daily Directives as Read**

OLT

Area Manager / Shift Supervisor

Operator

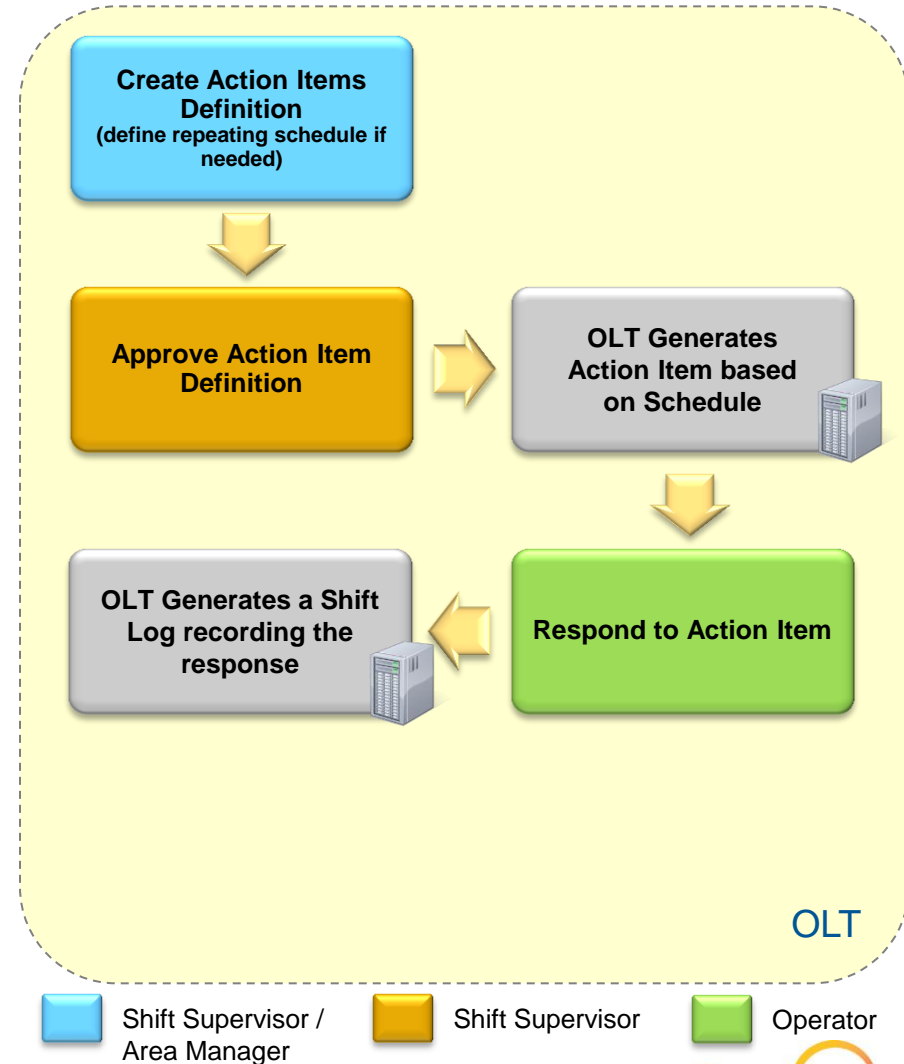SUNCOR ENERGY

# OLT Feature – Action Items

## What is an Action Item?

- Created by shift supervisor/area support manager to schedule work that needs to be done for the shift.
- OLT only generates Action Items when the:
  - Definition has been approved
  - and 30 minutes prior to shift the action was scheduled for
- Any responses to Action Items automatically creates a Shift Log.
- Definitions cannot be created in the past, must be scheduled for the future.

## How are Action Items accessed in OLT?

1. In the navigation pane click on ⬤ .
2. To create a Action Items:
   a) Select `Action Item Definitions` tab
   b) Click on `New ▾` button.
3. To respond/view select `Action Items` tab.

**Create Action Items Definition**
(define repeating schedule if needed)

↓

**Approve Action Item Definition** → **OLT Generates Action Item based on Schedule**

↓

**OLT Generates a Shift Log recording the response** ← **Respond to Action Item**

OLT

Shift Supervisor / Area Manager    Shift Supervisor    Operator

# OLT Core Feature - Shift Log

## What is a Shift Log?

- Record important routine activities, as well as, any non-routine activities or abnormal situations. Completed by Operators.
- Must be completed no later then 30 minutes after the end of your shift.
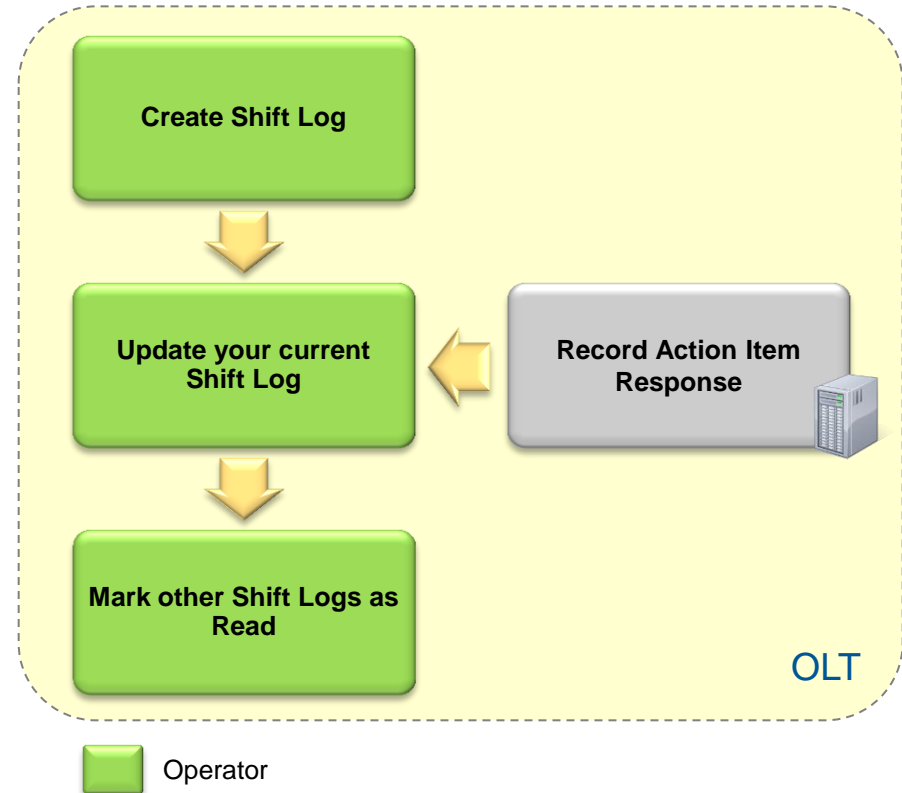
## What are Custom Fields?

- Records key values in the log that are of interest for the given work assignment.

## What are Templates?

- Ensures consistency by allowing the user to pre-fill the log with set information (ex: section headers).

## How are Shift Logs accessed in OLT?

1. In the navigation pane click on .
2. Select Logs tab.
3. Click on New button to create a new Shift Log.

Create Shift Log

Update your current Shift Log

Record Action Item Response

Mark other Shift Logs as Read

OLT

Operator
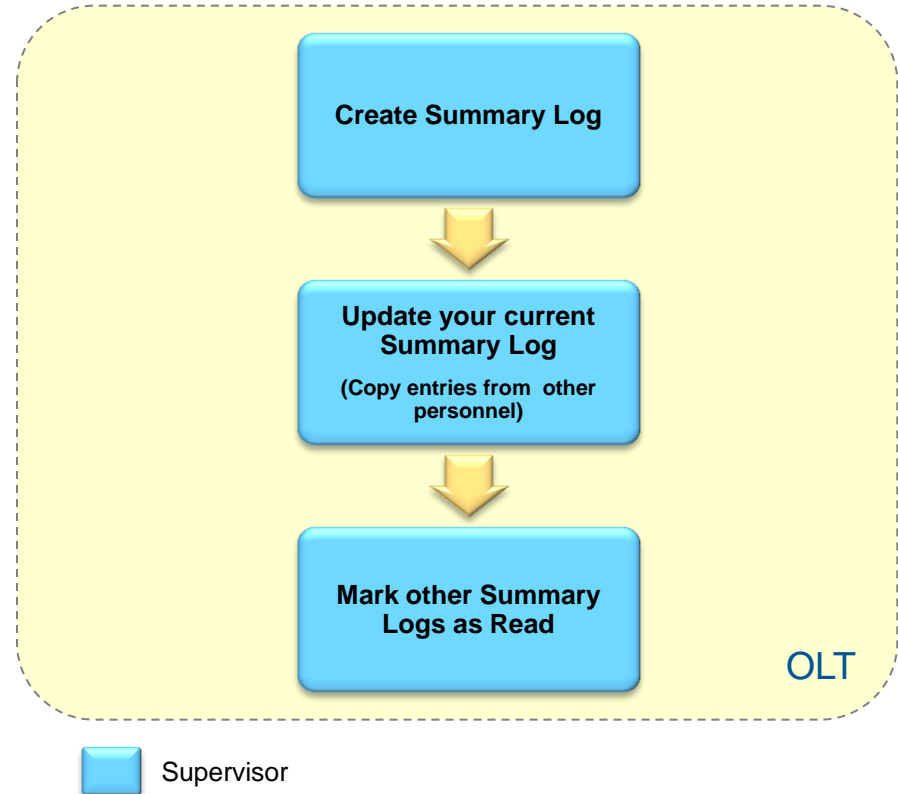
# OLT Core Feature – Shift Summary Log

## What is a Shift Summary Log?

- Summarize important routine activities, as well as, any non-routine activities or abnormal situations. Completed by Supervisors.
- Must be completed no later then 30 minutes after the end of your shift.
- Use the "Add to Shift" button to copy logs create by other area personnel during the same shift.

## How are Shift Summary Logs accessed in OLT?

1. In the navigation pane click on 📝.
2. Select Shift Summary Logs tab.
3. Click on New button to create a new Shift Summary Log.

**Create Summary Log**

⬇

**Update your current Summary Log**

(Copy entries from other personnel)

⬇

**Mark other Summary Logs as Read**

OLT

◻ Supervisor

# OLT Core Feature - Shift Handover
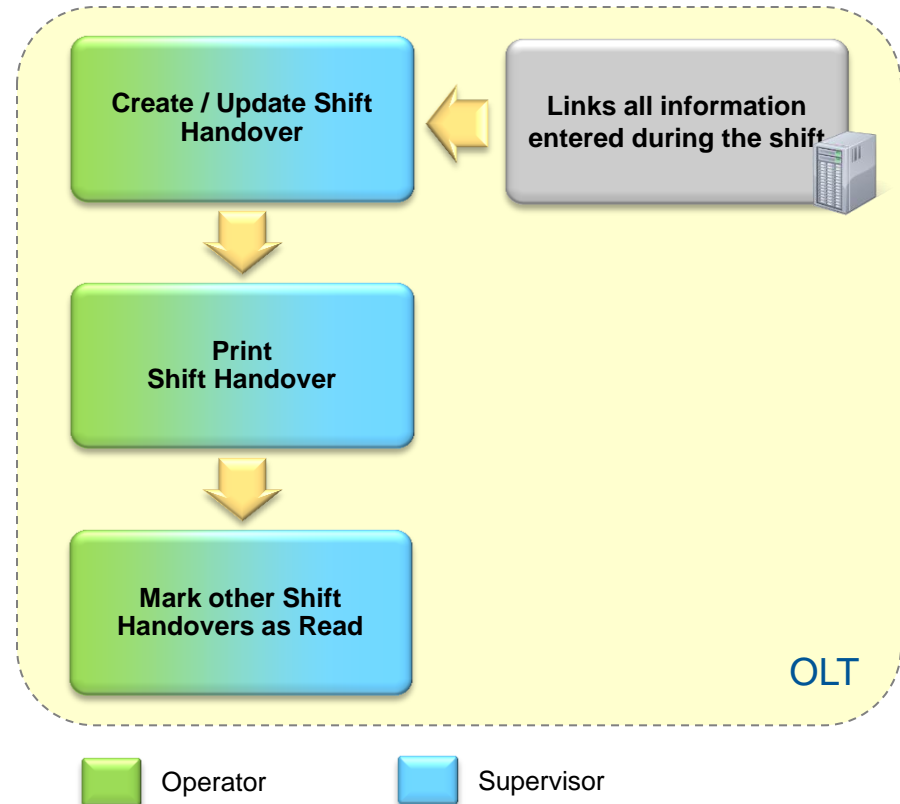
## What is a Shift Handover?

- Helps maintain continuity across shift changes by ensuring relevant information is communicated.
- It must be created within your shift and be completed within 30 minutes after the end of the shift.

## What does a Shift Handover include?

- Answers to key safety questions relevant to shift change.
- All Action Item responses, Shift Log, and Custom Field entries entered in the same shift and Work Assignment as you.
- Upcoming action items for your work assignment (must print/preview to see).

## How are Shift Handovers accessed in OLT?

1. In the navigation pane click on ✓.
2. Select Shift Handover tab.
3. Click on New button to create a new Shift Handover.

```
Create / Update Shift Handover  ←  Links all information entered during the shift
        ↓
Print Shift Handover
        ↓
Mark other Shift Handovers as Read

OLT
```

Operator (green)     Supervisor (blue)

# OLT Advanced Features

- **"Advanced"** OLT functionality is typically rolled out in the 2nd phase of a rollout once users have mastered core functionality (typically 6-12 months later):

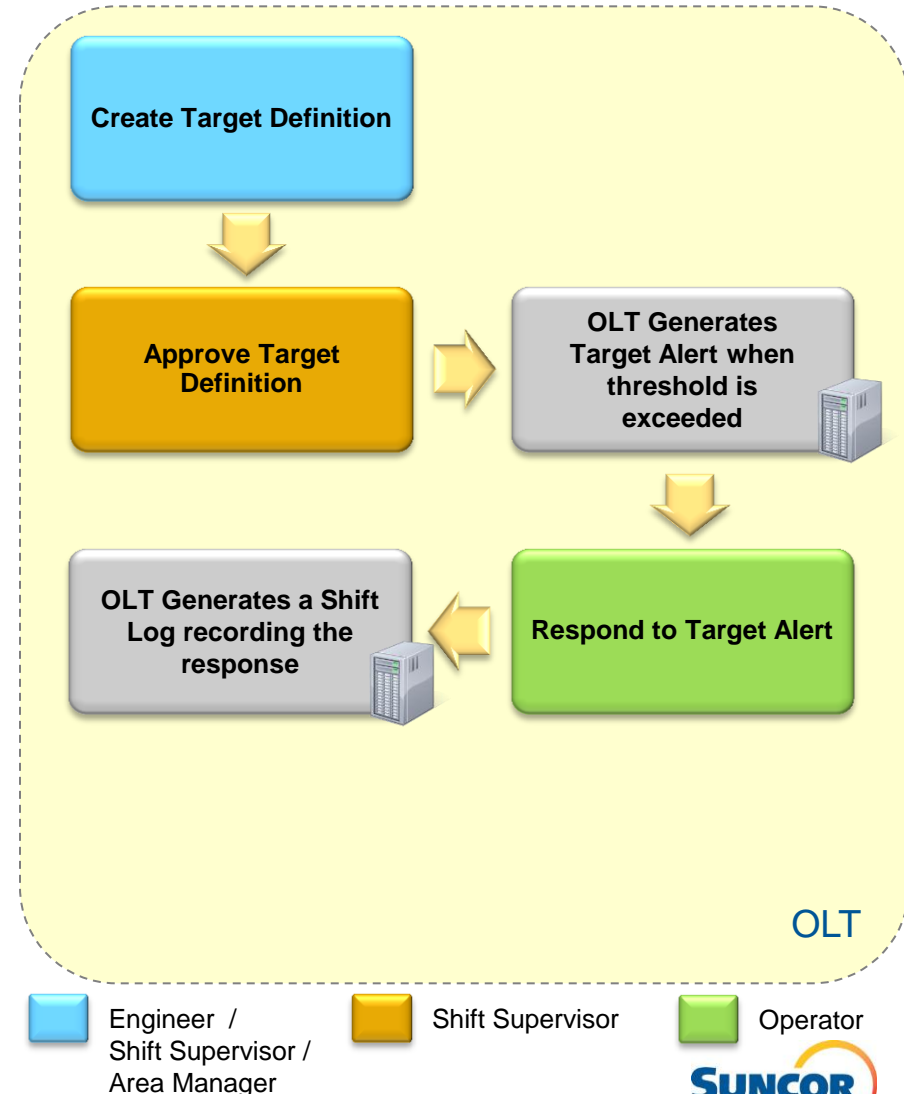| Feature | Description |
|---|---|
| Targets/Alerts | Used to monitor non-critical Plant Historian values and alert OLT users to values out of range |
| Electronic Safe Work Permits (eSWP) | Auto generate permit requests based on work order information from SAP or manually create permit requests |
| Electronic Forms | Used to populate and get approvals for electronic forms.<br>• Examples include: Critical System Defeats, Live Flare, Training Blocks, Critical Lift, Waste Disposal, Live Flare, High Energy Hot Work, Hazardous Isolation & Lockout, Zero Isolation Hazardous Lockout |
| Restrictions | Used to record what conditions are limiting the site from achieving its production target. Deviation Alerts are created on an hourly basis and allow personnel attribute reasons for the deviation. |
| Lab Alerts | Alerts personnel when scheduled lab samples have not been recorded in Plant Historian. |

# OLT Advanced Feature – Target Alert
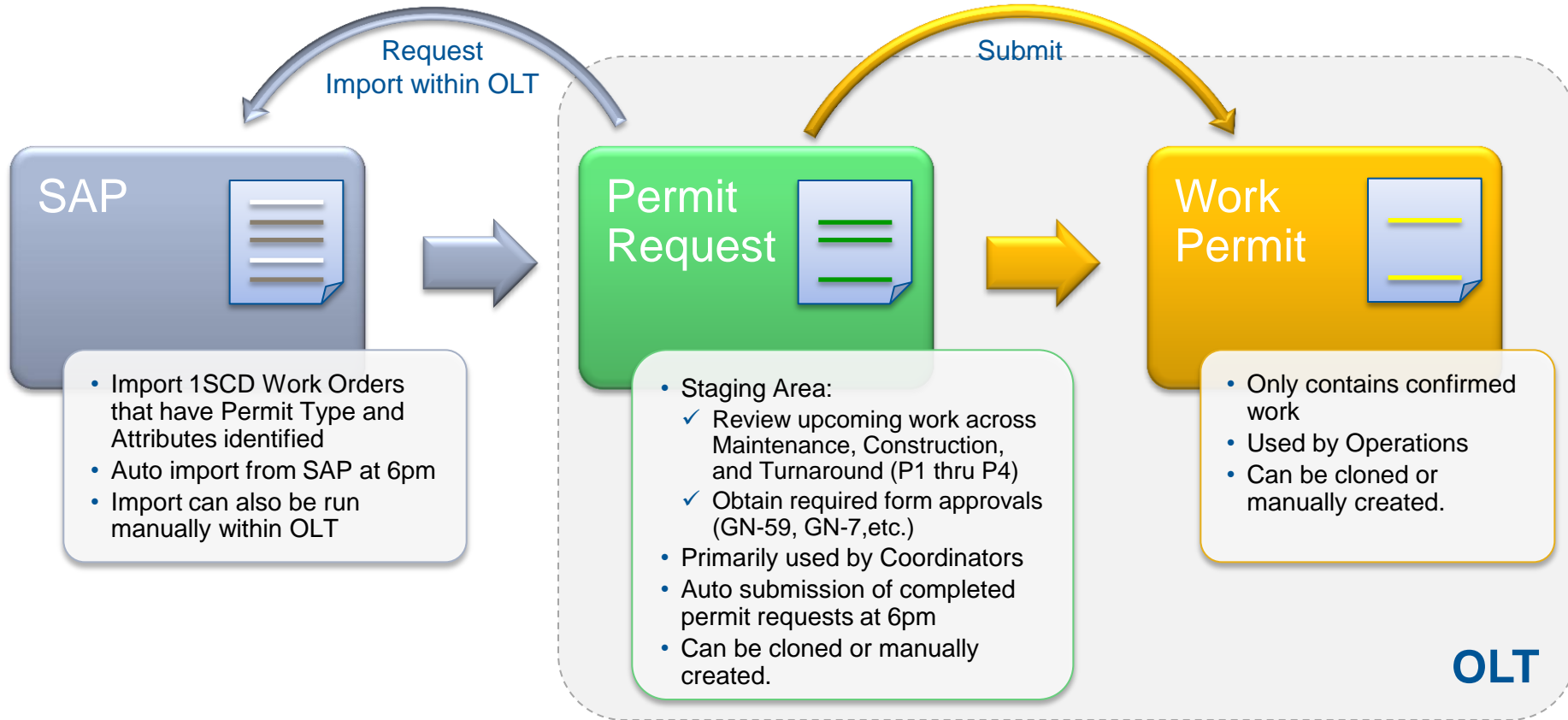
## What is a Target Alert?

- Used to monitor non-critical Plant Historian tags and alert personnel to out of range values.
- Typically created by engineers and shift supervisors to help operators take corrective action. Examples include:
  - Meeting Production/Performance Goals
  - Temperature based Seasonal Work
  - Performing Equipment Rotations
- OLT only creates Target Alerts when:
  - Definition criteria has been approved
  - and Thresholds have been exceeded
- Responses to Target Alerts automatically creates a Shift Log.

## How are Target accessed in OLT?

1. In the navigation pane click on ⊙.
2. To create a Target:
   a) Select `Target Definitions` tab.
   b) Click on `New ▾` button.
3. To respond/view select `Target Alerts` tab.

---

**Create Target Definition**

↓

**Approve Target Definition** → **OLT Generates Target Alert when threshold is exceeded**

↓

**OLT Generates a Shift Log recording the response** ← **Respond to Target Alert**

OLT

| Engineer / Shift Supervisor / Area Manager | Shift Supervisor | Operator |

# OLT Advanced Feature - eSWPs

Request
Import within OLT

Submit

**SAP**

- Import 1SCD Work Orders that have Permit Type and Attributes identified
- Auto import from SAP at 6pm
- Import can also be run manually within OLT

**Permit Request**

- Staging Area:
  - ✓ Review upcoming work across Maintenance, Construction, and Turnaround (P1 thru P4)
  - ✓ Obtain required form approvals (GN-59, GN-7,etc.)
- Primarily used by Coordinators
- Auto submission of completed permit requests at 6pm
- Can be cloned or manually created.

**Work Permit**

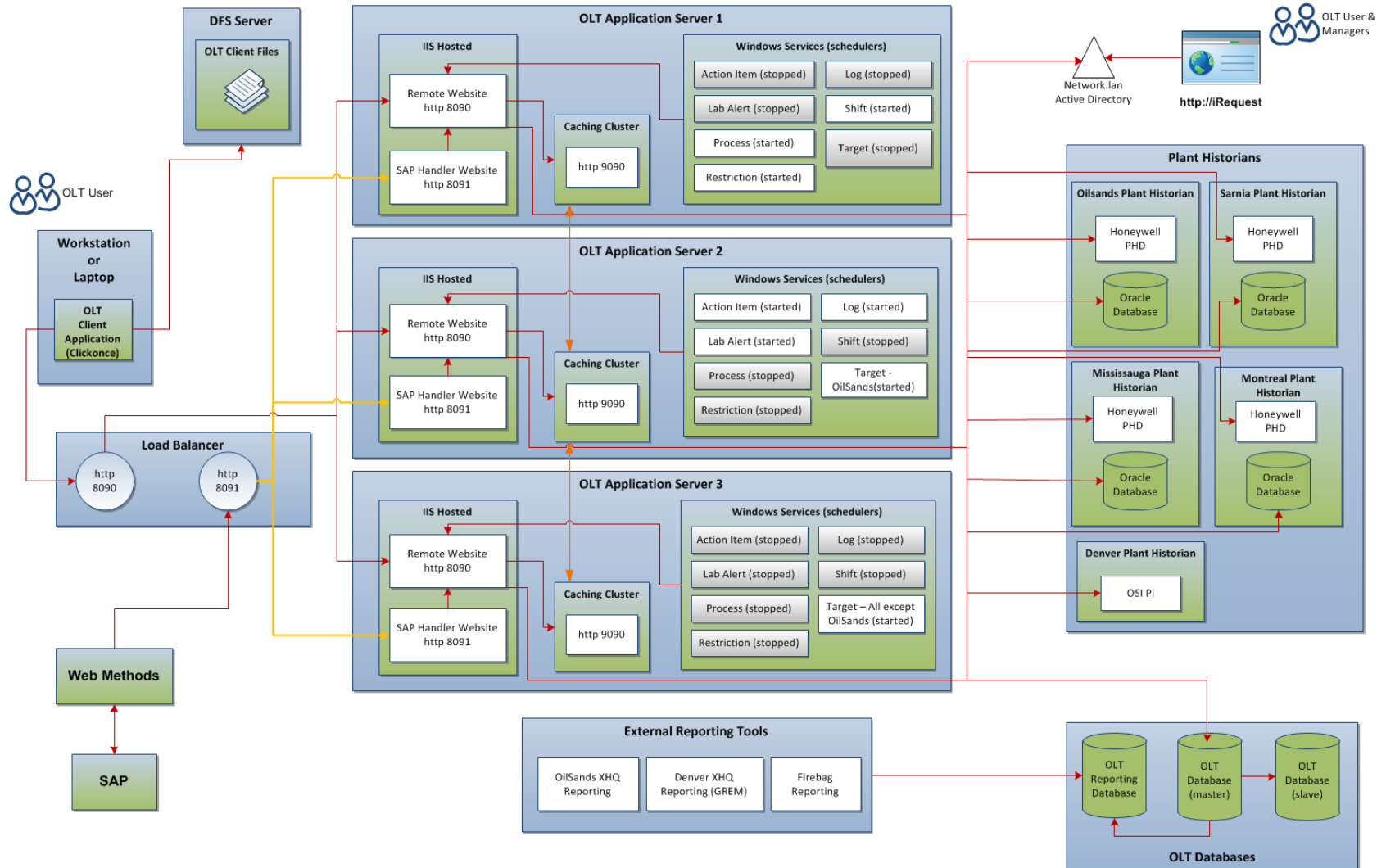- Only contains confirmed work
- Used by Operations
- Can be cloned or manually created.

**OLT**

- Some groups use Primavera for scheduling their work. In those cases an additional interface called Pipeline will need to be used to synchronize the dates back into SAP.

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# OLT Technical Architecture Overview

# Questions