Shift Connection
Setting us up for success!

Irving Oil

Operator Shift Log Project

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Galveston, TX   May 2012

Coking.com
MORE PRODUCTION - LESS RISK!

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Irving Oil Today

- Irving Oil is a privately-held regional refining and marketing company, headquartered in Saint John, New Brunswick

- Canada's largest refinery, producing over 300,000 bpd of finished energy products

- 10 distribution terminals and a fleet of delivery trucks serving wholesale and commercial customers throughout Atlantic Canada, Quebec, Ontario and New England

IRVING

Communication – Key to Success

➤ A key success factor for any organization is excellent verbal and written communications between working teams. At Irving Oil, we consider it to be a critical success factor for a safe and reliable workplace.

➤ One way to improve upon communications is to focus on a highly engaged workforce that is equipped with all the tools they require to be successful.

➤ The shift turnover log is one of those tools.

➤ The shift teams use the log verbally to discuss with their shift relief the current operation of the plant, optimization efforts and discuss any risks or incidents.

➤ Without this conversation, we open ourselves up to potential risks and/or incidents.

➤ With cNotes, our turnover logs are directly tied to our operating plans. As a result our teams are better engaged in achieving plant and refinery optimization.

➤ All entries into cNotes record the users credentials which is raising personal and team accountabilities, and helping us to achieve our objective of a highly engaged workforce.

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Safety – Our Core Value

➤ In general, poor shift turnover communications has been found to be a contributing factor in refinery incidents for other companies within the Refining Industry.

➤ Without communication, the log is just that, a log.

➤ The 'passing of the baton' from one shift to the next (during the shift turnover meeting) using a well written log as a vehicle for conversation, will enable us to ensure all incidents are prevented.

➤ Safety is our core value, both at work and at home, we believe **all** incidents are preventable.

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Shift Turnover Process - History

➤ Over the years, Operations shift turnover process has not been a structured one (mainly excel, MS word or hand written).

➤ In some cases, the data being recorded and communicated from one shift to the next was not current and/or relevant data.

➤ The overall objective was to simplify the process of Shift Handover with a consistent format across all areas, and enable operators to communicate what matters in a way that focused on accountability and accuracy while focusing on:

- ➤ Safety Concerns
- ➤ Environmental Concerns
- ➤ Unit Operational Issues
- ➤ Maintenance Activities
- ➤ Daily Orders
- ➤ Night Notes
- ➤ Requests from Plant Technical Services

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Selected Solution - cNotes

➤ The process to select a software provider for our Shift Log project was extensive.

➤ We began with an internal review of the build vs. buy options. It was decided that buy was the best option.

➤ We engaged with vendors through our RFP (request for proposal) process that lead us to CSoft Technologies and their cNotes product.

➤ cNotes provided not only the functionality we were looking for (easy to use, web based, customizable look and feel) – CSoft also offered a cost effective hosting model that would allow our stakeholders the ability to access Shift Connection from <u>anywhere</u> (work, home, mobile devices).

CSOFT TECHNOLOGIES CONSULTING

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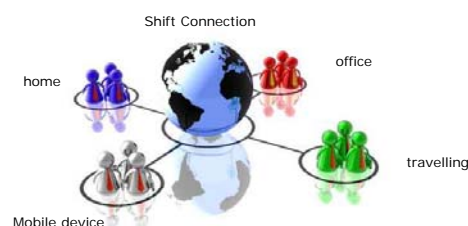
cNotes - Functionality

➢ cNotes is a software solution that is used by operators, management, engineers, planning teams.

➢ Our hosted environment allows for access by external resources (i.e. product inspectorates).

➢ Key functionality includes:

> ➢ Web-based technology with a familiar Microsoft look and feel.
> ➢ Security and administration within the application.
> ➢ Provide connection to the plant historian data.
> ➢ Provide safety notes, daily orders and night notes.
> ➢ Ability to create expiring notes.
> ➢ Ability to create targeted questions for user response.
> ➢ Customized module creation capability.
> ➢ Total Accountability at every level.
> ➢ Every level of operational personnel has the visibility to all areas of the Operations team.
> ➢ Advanced key word search capability..
> ➢ Easy to use report creation and distribution.
> ➢ Auto-save and archiving enabled.

Shift Connection

➢There was a strong desire internally to have a meaningful name - 'passing the baton' was selected to symbolize the shift handover.

Overview

➢ The Shift Connection Home Page is the 'go to' page for overall safety stats, key messages and links to other internal applications.

➢ We also have the ability to send feedback and apply a frequently asked questions section.
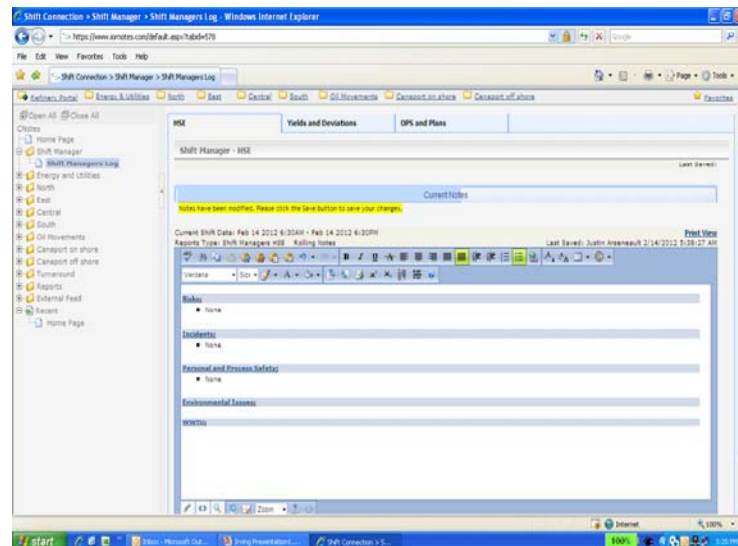
Notes Module

➢ All user notes sections can be configured and be set to 'rolling notes' or 'shift by shift' notes.

    ➢ Rolling Notes – will carry over from shift to shift until the user removes them.

    ➢ Shift by Shift Notes – will clear at the beginning of the next shift (at a time you decide).

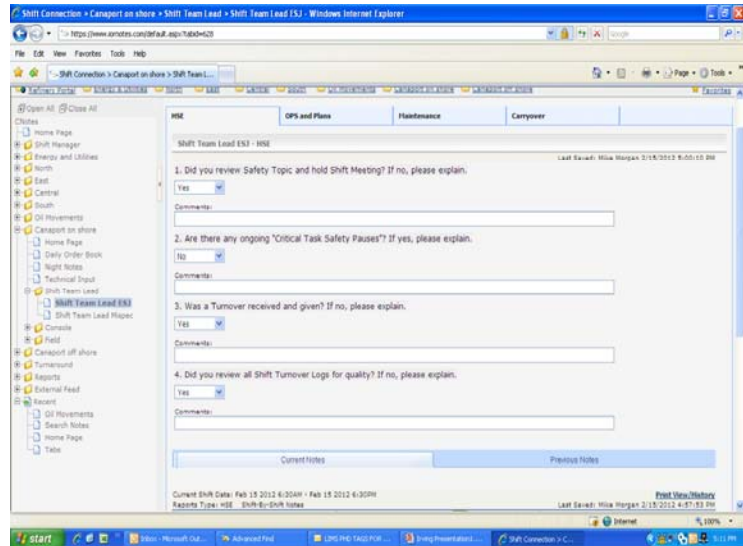   ➢ Auto save is also a key function of cNotes.

Targeted Questions

➢User notes questions are targeted as reminders for the user.

➢Questions can be set to have a flagged response that can be reported on easily.

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Historian/Lab Connection

➢Our plant historian data is compared to our daily plan targets.

➢Operators have the opportunity to add corrective actions to deviations.

➢Currently working with CSoft to develop a new module that will automate the population of our plan numbers into the logs.

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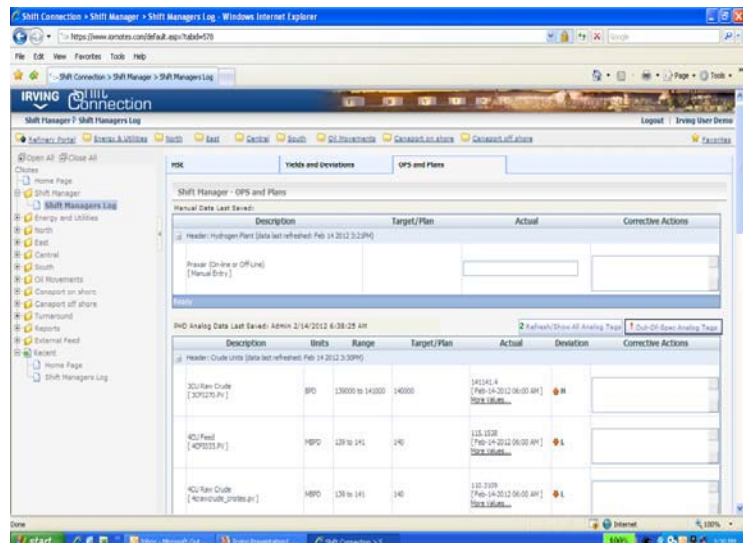
Expiring Notes

➢ Expiring notes allow us to add orders and instructions that will automatically expire based on number of days or a specific date.

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Historical Search

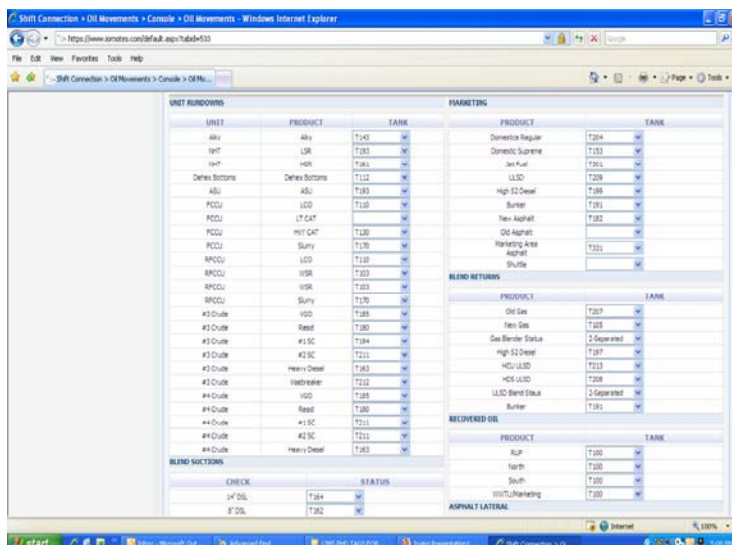➢ Quick historical views allow for notes lookup for the past 6 shifts.

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Advanced Search Capabilities

➢Advanced search capabilities are available for specific key word, date or shift or specific log lookup capabilities.

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Custom Modules

➢Our Oil Movements and Marketing team required custom modules to allow drop down list capabilities.

➢CSoft was responsive to our needs and able to deliver a tool that has been well received by the users.

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Calendar

➤The calendar module is used extensively by our off-shore team to schedule reminders for meetings and specific tasks.
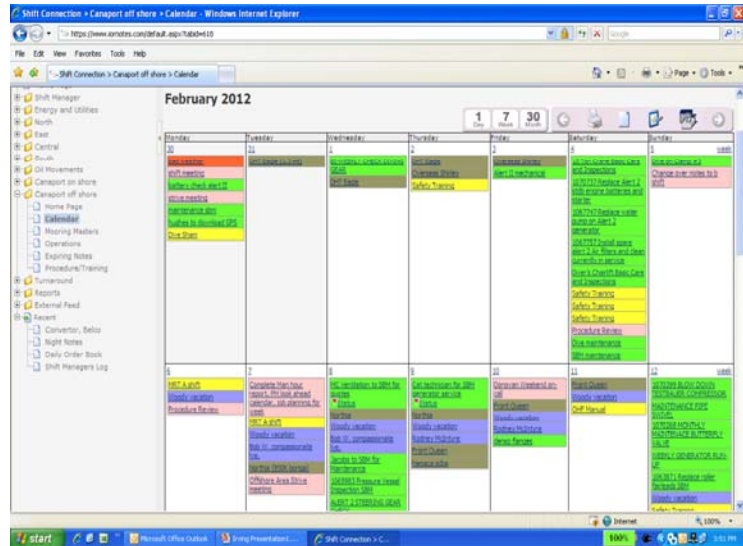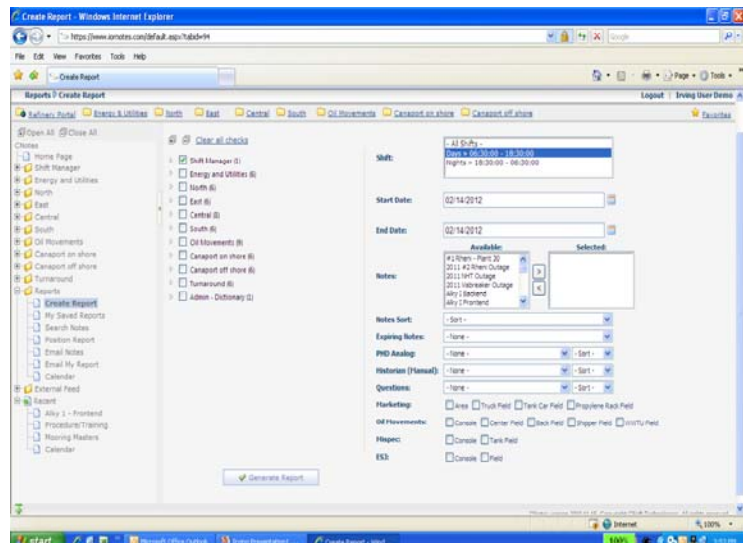
Reports

➤Users have the option to create a one time report or create reports to save for use later – or share with other users.
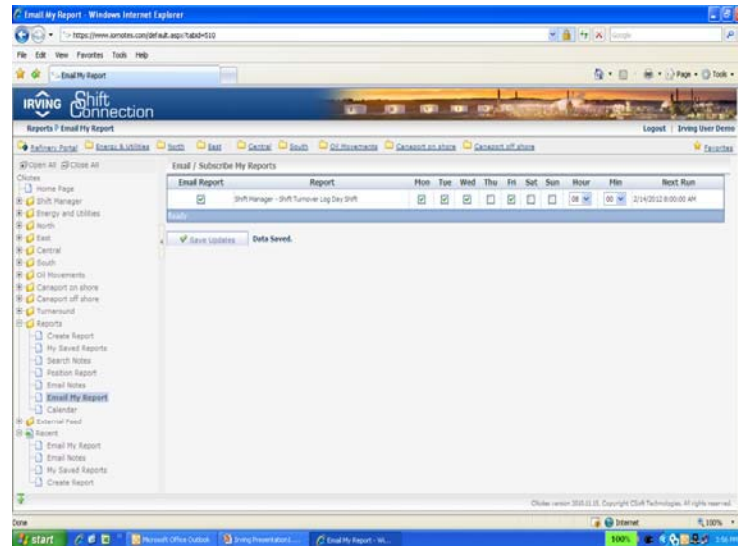
Email Reports

➢Reports can also be sent to users via email at the days and time they select.

➢Notes only can be sent as well at the moment they are saved – this is beneficial for notes that are attributed to Safety or the Environment.
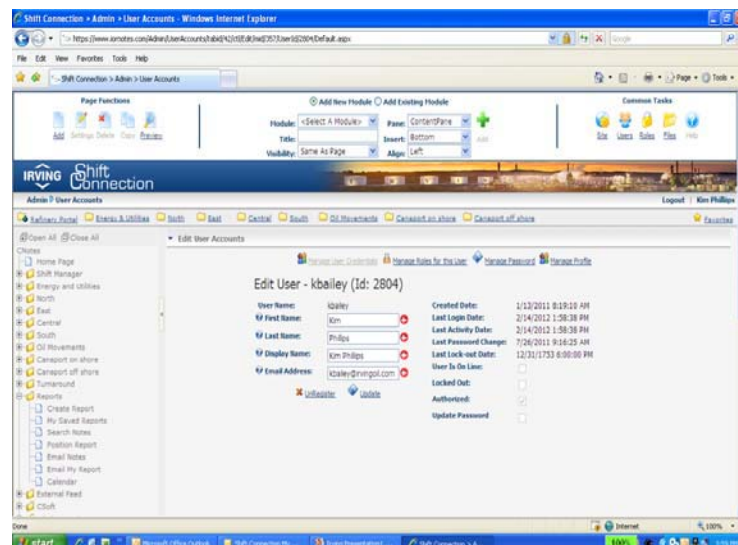
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Administration

➢For the systems administrator, cNotes is an intuitive and easy to navigate tool.

➢Security can be set by roles and users – you can set access at the page, portlet or site level.

➢New modules are added easily in a 'container' look and feel.

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Recap

➢The CSoft team has been very responsive to our needs and timelines – they have been open to suggestions for custom modules, as well as our needs as a customer.

➢We required custom built modules – which CSoft successfully created.

➢Responsive to new requirements and open to suggestions for improvement.

➢Change Management was an aspect of the project we knew would be a challenge internally – it was.

> ➢ Now that the benefits are understood – users have engaged in the tool and are using it as hoped.

➢Many of our team members embrace the hosted solution - many sign-in to Shift Connection from home when they are returning to shift from days off.

➢Irving Oil now has a scalable sustainable shift turnover solution, that is meeting the needs of operations, management and supporting teams.

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Thank you…..

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