



*API Pipeline Conference and
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The Key to Change Management Success? Communication!

SCADA Checklist/PSSR Role in Change Management

Checklist:



&

PSSR:
Pre
Startup
Safety
Review



= Planning for
Success

Checklist/PSSR

- ▶ A combined process, which improves communication, design and safe implementation of change:
 - Communication – All parties are aware of and have the opportunity to participate in change
 - Design – Stakeholder involvement up front increases the opportunity for design success, the first time around
 - Safe Implementation – Effective design and communication promotes a safer implementation process

SCADA Checklist

- ▶ Checklist of potential impact to Operations Control, examples:
 - SCADA screens, controls, etc...
 - Layered applications, such as leak detection and batch tracking



SCADA Checklist

- ▶ **Involve stakeholders up front**
 - Project Manager, Supervisor, SCADA Analyst, Controller, etc...
- ▶ **Review tasks and assign deliverables**
 - Due dates
- ▶ **Schedule follow up stakeholder reviews to monitor progress**
 - Determine frequency based on size/scope of the change



PSSR

- ▶ Check out performance of deliverables
 - Determine and document check out process
 - Full RTU, single point, field, etc...
 - Determined by scope of change and company policy

- ▶ Determine impact to procedures
 - General or site specific

PSSR

- ▶ Determine process for training
 - Simulator, one-on-one, procedure review, classroom, CRR (Controller Required Reading) etc...
 - Impacted by scope of change

- ▶ Review for any follow up items to speed up closure

- ▶ Document final stakeholder “sign off” prior to implementation of change

SCADA Checklist/PSSR Role in Change Management

- ▶ Implement change

- ▶ Post implementation review
 - Identify best practices for future change
 - Fine tune SCADA Checklist/PSSR process
 - Inspect documentation
 - Close change process

SCADA Checklist/PSSR Role in Change Management



**For your time and
attention**