



Automating Manual Procedures in Continuous Process Applications Using the Concepts of ISA-106

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2014
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USERS CONFERENCE
AND EXHIBITION
Harness the Future of Innovation

❖ Procedure Automation for Continuous Process Operations

❖ Membership

- 168 members
from 106 companies
- 25 voting members
- ~45% of members
are from
owner / operators

❖ Co-Chairmen

- Yahya Nazer,
Dow Chemical
- Bill Wray,
Bayer Material
Sciences



- ABB
- Aramco Services Co
- AREVA
- Bayer MaterialScience
- BP Lubricants
- Braskem
- CDM Smith
- CH2M HILL
- Chevron
- Conocophillips
- DuPont
- Emerson Process Management
- ExxonMobil
- Herman Storey Consulting
- Honeywell
- Invensys
- Mustang Automation and Control
- NovaTech Process Solutions
- PAS
- Prosys
- Rockwell Automation
- RSI Simcon
- Saudi Aramco
- Savannah River Nuclear Solutions
- Shell
- The Dow Chemical Company
- Valero Energy Corp
- Yokogawa

❖ Published 1st Technical Report in 2013

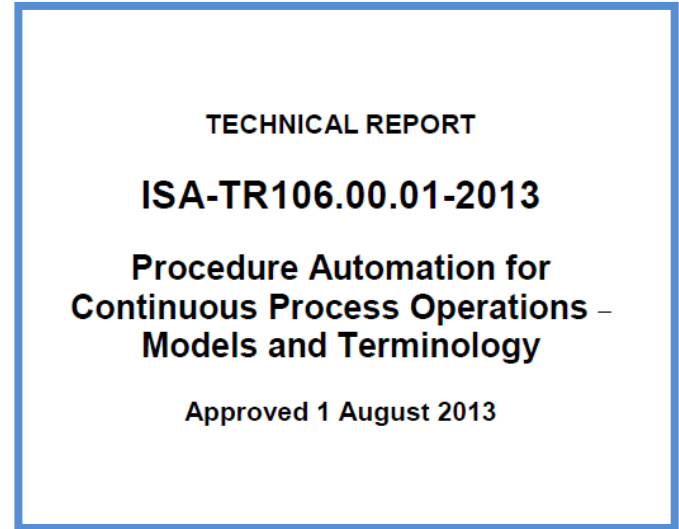
- Models and Terminology
- Available in the ISA store at www.isa.org

❖ Working on the 2nd Technical Report

- Work Processes

❖ Work on the Standard is expected to start in 2014

- Use industry feedback on the technical reports to create the standard



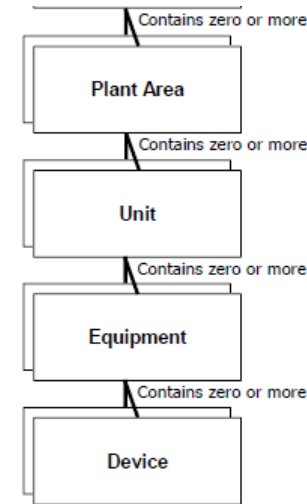
❖ States committee's current thinking on how to organize and approach procedure automation

❖ Models

- Concepts to give the industry a common mental model

❖ Terminology

- Definitions to give the industry a common language



3.1.45 state-based control

A plant automation control design based upon the principle that all process facilities operate in recognized, definable process states that represent a variety of normal and abnormal conditions of the process.

3.1.46 status notification

A notification generated by the BPCS that helps provide the operator situational awareness, is part of normal operation and does not require operator action.

ISA-106 Procedure Automation for Continuous Process Operations Technical Report 1 Summary 1 of 2

Technical Report Summary

Committee Purpose: Develop Standard for automating procedures in continuous process operations.

Scope of Technical report is to provide a common basis of understanding of the benefits, best practices application, and language including terms and definitions, that will allow for the application of procedural automation across the continuous process industries.

In agreement with the scope of the ISA106 Committee, this Technical Report focuses on automated Procedures that primarily reside on systems within the supervisory control, monitoring, and automated Process Control section of the production process. It is not the intent of the committee to have this Technical Report focus on Procedure execution at the operations management functional level.

Additionally, the focus of this Technical Report will be on continuous processes. However the contents of the technical report may be used in other types of Process Control such as batch or discrete.

The Technical Report is intended to be applicable to ProcessControl activities within the Basic Process Control System(BPCS) and Safety Instrumented Systems (SIS). Required Safety Instrumented Functions (SIF) should be analyzed, and implemented in accordance with ISA-84.

Key Definitions

Basic process control system (BPCS): System which responds to input signals from the process, its associated equipment, other programmable systems and/or an operator and generates output signals causing the process and its associated equipment to operate in the desired manner but which does not perform any safety instrumented functions with a claimed SIL ≥ 1

Implementation method: A tool used to create a Task Example: Programming languages, BPCS configuration tools and a word processor

Operator confirmation operation: The command is performed by the control system, however the operator needs to verify.

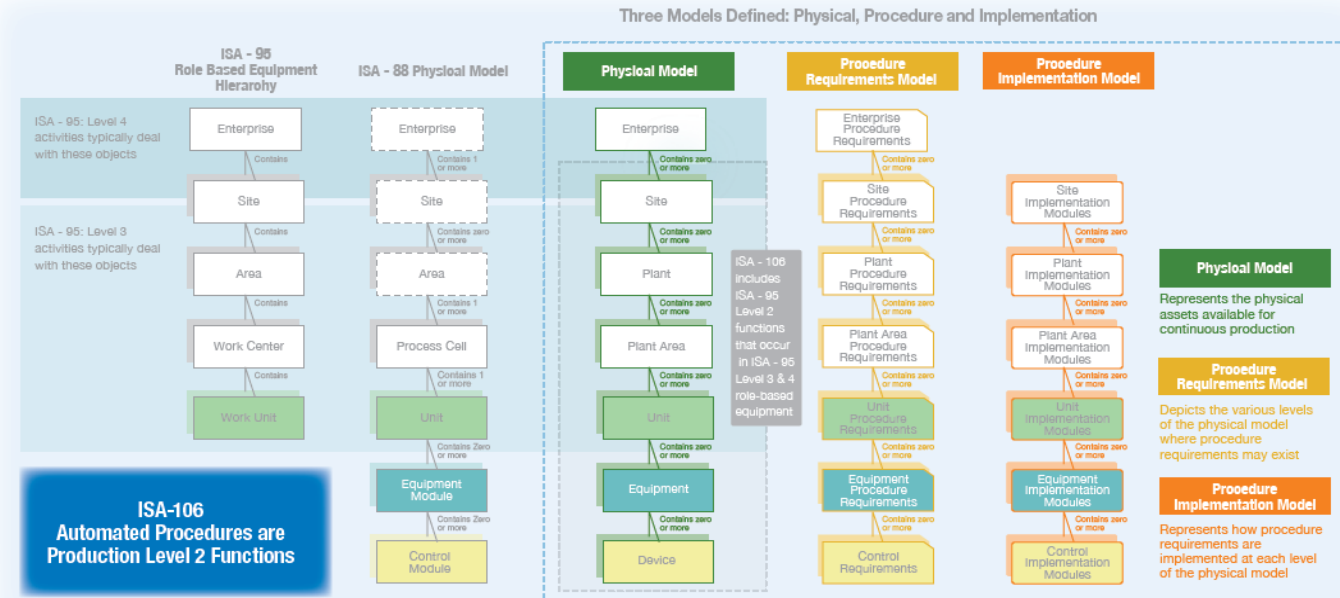
Procedural automation: Implementation of a procedure on a programmable mechanical, electric, or electronic system.

Process point of view: The view of a particular unit as a whole, not as a collection of individual loops. A control program written from the process point of view allows the operator to interact with the process as opposed to with control loops.

Process state: Distinct mode of operation that a unit moves through as it progresses from shutdown to operating and back to shutdown. Each Process State represents a unique operating regime that supports the unit's objectives of processing an input into a desired output.

State based control: A control program methodology that utilizes a framework that defines the "process states" through which equipment (general) passes during start-up, run, and shut-down conditions. These states determine the status of each controller, motor, block valve, and alarm for the unit operation.

State-based alarm (mode-based alarms): An alarm that is automatically modified or suppressed based on process



Value Proposition Summary

- 1. Improved safety performance** - Automating procedures and utilizing state awareness for alarm management the workload on the operational staff is reduced during abnormal conditions. This enables more effective responses to abnormal conditions and reduces the probability of human error.
- 2. Improved reliability** - Automated procedures can aid in maintaining maximum production rates, minimizing recovery time and avoiding shutdowns.
- 3. Reduced losses from operator errors** - Automating procedures enables operations staffs to standardize their operating procedures. A standardized approach both reduces the likelihood for human error contributing to abnormal conditions and also lessens the time required to recover from abnormal conditions.

- 4. Increased Production by improving startups and shutdowns** - Operations may benefit by achieving faster, safer and more consistent startup and shutdown operations of processes by automating the procedural steps.

- 5. Increased Production and Quality via efficient transitions** - Most operational requirements staffs require process transitions from one condition to another during normal operating conditions. Automating procedures enables operations to accomplish transitions with reduced variability and in less time.

- 6. Reduced losses through improved responses to disturbances** - Automated procedures can be prepared for potential disturbances, reducing the time to return operations to desired steady state conditions.

- 7. Improved Operator Effectiveness** - Reduces the time an operator spends carrying out repetitive tasks and enables them to focus on process optimization and avoidance of abnormal conditions.

- 8. Higher Retention and Improved Dissemination of Knowledge** - Automated procedures can be used to retain the knowledge of the process. This is especially important for procedures that are not executed frequently.

- 9. Improved Training** - As knowledge & best practices is captured into automated procedures, the resulting documentation and code can be used as material for training new operators on the process.

- 10. Improved insight into the process** - By recording system and operator actions with procedural automation, users have the opportunity to review and analyze data from every startup, shutdown, process transition, and abnormal condition recovery.

- 11. More efficient change control** - A structured, modular approach to procedural automation minimizes production change control costs.

- 12. Reduced costs of enterprise adaptation** - Once the overall and standard structure for sequence control has been defined and implemented, it can be modularized into libraries of code/procedure/documentation to allow easy cloning/replication from one area or site to another.

- 13. Common definitions and terminology** - Operational staff have a common set of terms with uniform definitions to describe the requirements for improvements and changes in procedural automation. This improves communications with EPC's, system integrators, automation suppliers, and internal company departments.

Provided by YOKOGAWA

ISA-106 Procedure Automation for Continuous Process Operations Technical Report 1 Summary 2 of 2

Examples of Physical Model Level Names

| Physical Model Level | Level Name Definition | Examples |
|----------------------|---|--|
| Unit | An Equipment grouping to carry out one or more processing activities such as reaction, crystallization, or distillation. It combines all necessary physical processing and control process equipment required to perform those activities as an independent process equipment grouping. | -Reactor -Distillation Column -Wed End -Contactor -Dry End -Separator -Pulper -Dry/Wet Oil Tanks -Filters -LACT Unit -Compressor -Pipeline pumps -Well Head -Hydrocyclone -Reboiler -Flotation Cell |
| Equipment | A collection of physical devices and process hardware that performs a finite number of specific processing activities | -Pump set -Compressor -Analyzer and sampling system -Control loop -Feed system |
| Device | The lowest level of physical hardware in the Physical Model in a Process. Examples include control valves, instrument, and motors | -Analyzer -Pump -Temperature transmitter -Control valve |

An Automation Style is a consistent approach to designing and implementing Implementation Modules. Automation Styles provide Operators with consistency in the use of automated Procedures and can lower engineering costs by providing a framework that fosters re-use of procedural logic.

There are any number of Automation Styles that cover a spectrum of operating styles from no automation resulting in full Manual Operation to complex automation with fully automated operation.

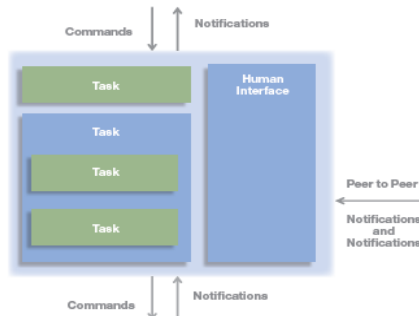
An important aspect of an Automation Style is how much process knowledge is to reside in the Automated Procedures. More complex Automation Styles contain more process knowledge and can therefore Perform more normal and abnormal process conditions automatically thereby providing more consistent and efficient operation of the Process. Simpler Automation Styles contain less process knowledge so the Operator must Perform more Procedures and more closely monitor the Process. Three examples of Automation Styles are:

Manual Automation Style – The Operator is responsible for the Command, Perform And Verify work items. The Operator may use the BPCS console or local indicators and actuators in the field, but there is no computerized Procedural Automation involved.

Computer Assisted Automation Style – Implementation Modules are considered computer assisted when the Operator and computer share responsibility for the Command, Perform And Verify work items. The amount of automation used may vary.

Fully Automated Automation Style – Implementation Modules are considered fully automated when the computer is responsible for the bulk of the Command, Perform and Verify work items.

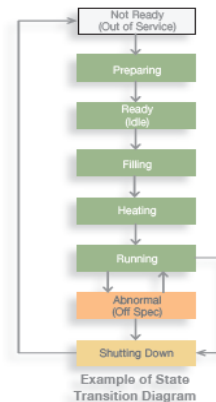
Implementation Modules - Consist of a set of ordered tasks. Tasks may contain other tasks. Each task provides plant operations with step by step instructions for accomplishing the actions that are to be performed and their verification. From an operational perspective a procedure is one or more implementation modules. Figure below shows the components and inputs/outputs of an implementation module.



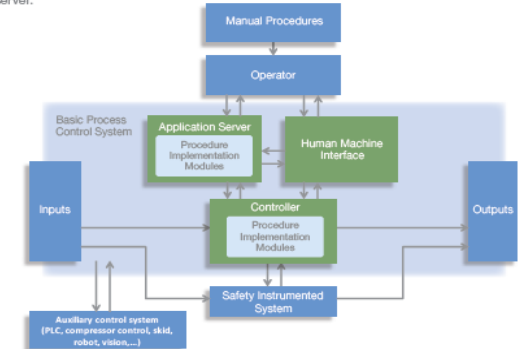
Process States- States-Use of Process States is one method that gives a framework for organizing automated Procedures as more complex Automation Styles are used.

When using Process States, Procedural Automation is centered on a major piece of process equipment, usually a Unit. States are defined based upon the physical conditions the process equipment passes through to ensure safe and efficient operation.

The process state concept can be expanded to implement State Based Control.



Mapping Implementation Modules to BPCS Components - Implementation Modules are run in a BPCS controller or a BPCS application server. Figure below provides a conceptual diagram of a BPCS and shows Implementation Modules in the controller and application server.



When a Task's Implementation method results in a Task that cannot be run by a computer it is considered a manual Procedure and are beyond the scope of the BPCS. Some of these Implementation Modules may be performed by a field Operator using a printed or handheld electronic checklist. The decision to run Implementation Modules in an advisory computer or a controller is based upon safety, risk, cost and benefit.

An Implementation Module requiring fast time responses such as sequencing a set of pumps and valves with critical timing may be implemented in a real-time controller. Other Implementation Modules that do not require as high a speed response or involve more Operator interaction may be implemented in a PC/server based computer.

Criteria for deciding the appropriate location of an Implementation Module include:

- Procedure implementation cost
- Procedure lifecycle cost
- Time responses required by the Process
- Health, safety and environmental risk
- Operating philosophy for Operator interaction with Procedures
- Availability of instrumentation to perform automated tasks
- Desire for incremental implementation of automated Procedures

Three work items are required for the Implementation Module to Execute

Command – The trigger to initiate the Implementation Module. When received this causes the Implementation Module to Perform its Tasks. A Command may be issued by an Operator or another Implementation Module.

Perform – The execution of a Implementation Module's Tasks. A Task may use any type of Implementation Method, but ultimately the Task is Performed by an Operator or a computer.

Verify - Verification that the Implementation Module's Tasks were Performed successfully or failed. The verification may use any type of Implementation Method, but ultimately the verification is Performed by an Operator or a computer.

❖ Refining

- Transition Management for Crude Switchover
- Regeneration

❖ Petrochemical

- Startup / Shutdown
- Transition Management for Grade Changes
- Line Switchover
- Cleaning

❖ Polymers

- Grade change
- Switchover

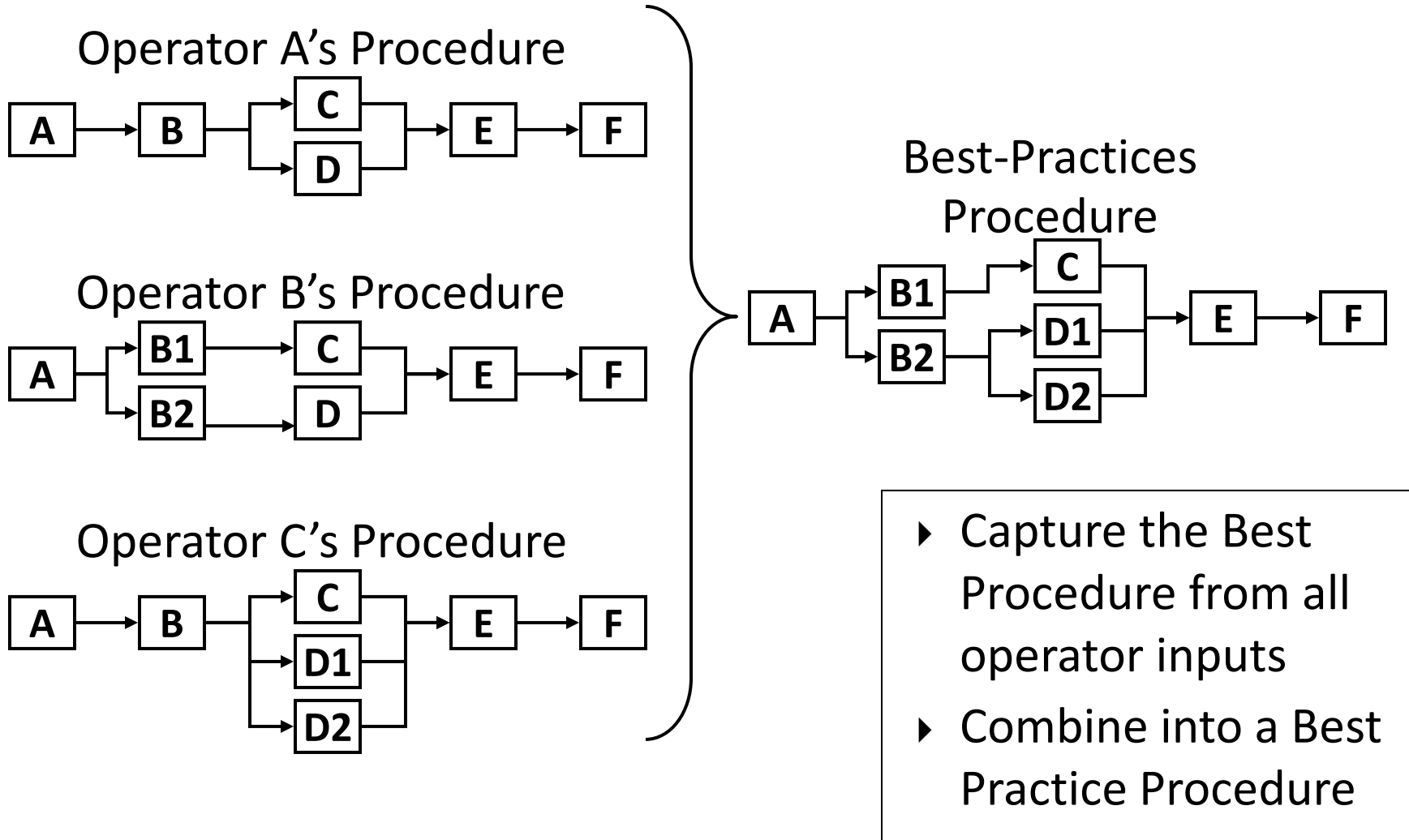
❖ Furnaces

- Decoking



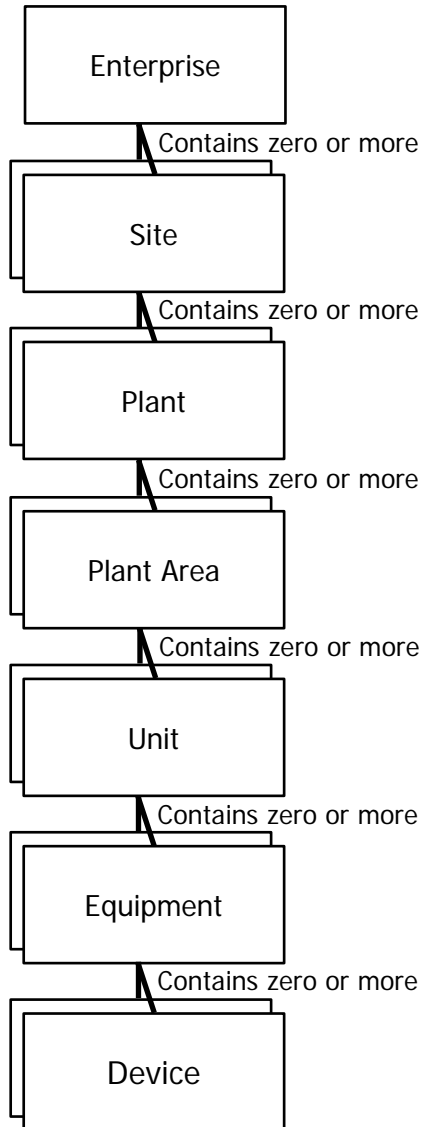
- Consistent operation
- Improved safety performance
- Increased production by improving startups and shutdowns
- Increased production and quality via efficient transitions
- Improved operator effectiveness
- Improved insight into the process
- Reduced losses through improved responses to disturbances.
- Reduces risk and losses due to fewer operational errors
- Ensures & documents compliance with procedures



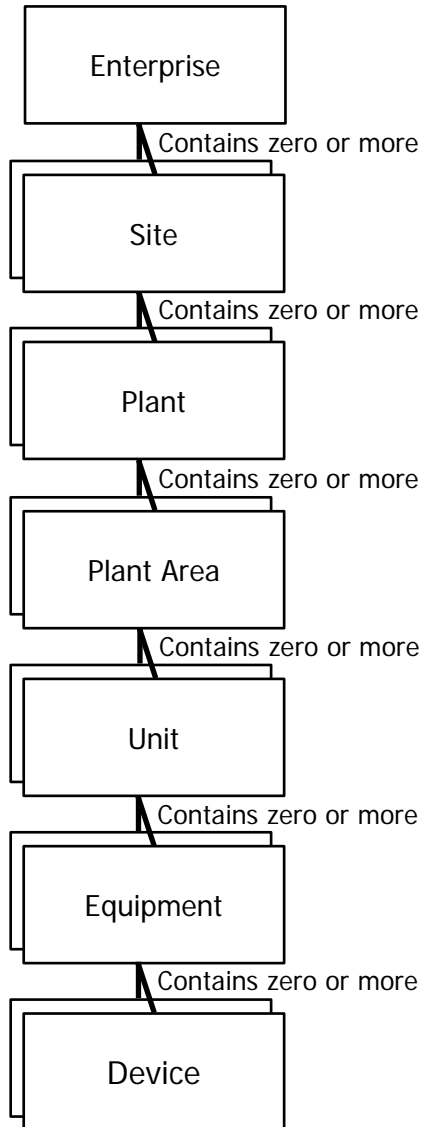


- ❖ Automating a procedure requires
 - Review and sometimes updating the current procedure
 - Engineering design, implementation and testing
 - Operator acceptance
- ❖ Base the decision upon what your business justification is
 - Where is your value
- ❖ Possible criteria
 - Risk reduction / Safety improvement
 - Consistent operation
 - Critical, low frequency procedures like startups and shutdowns
 - Complex procedures
 - Opportunities for improved profitability, as with transitions
 - Highly repetitive and low value tasks performed by the operator to free up their time for higher value work
- ❖ What is your experience level with automated procedures?



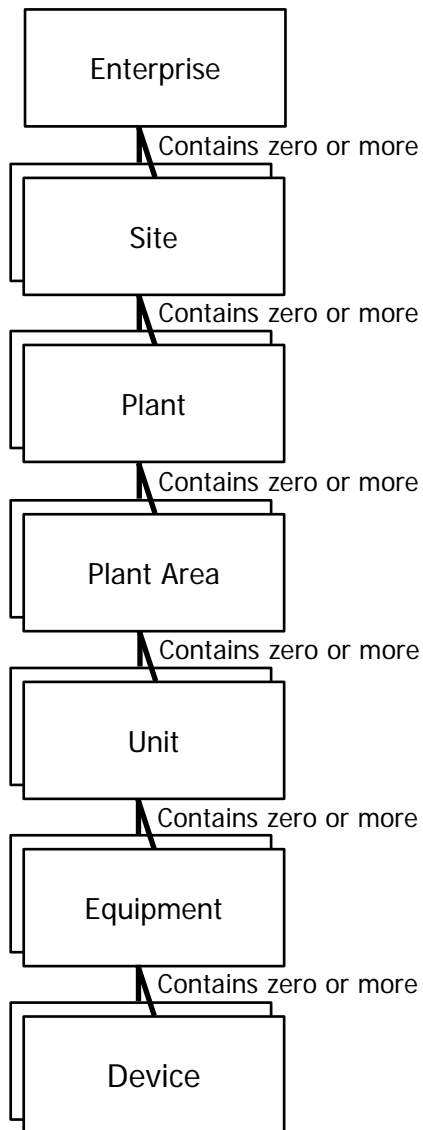


- ❖ Organizes physical equipment into a hierarchy
- ❖ Foundation of the ISA-106 work
 - Each item in the model can have procedures
- ❖ Provides a common set of terms and equipment levels for companies & industries to map their terms to
 - Common terms enable products and people to work more efficiently with different owner/operators.



Results of committee owner/operator terminology

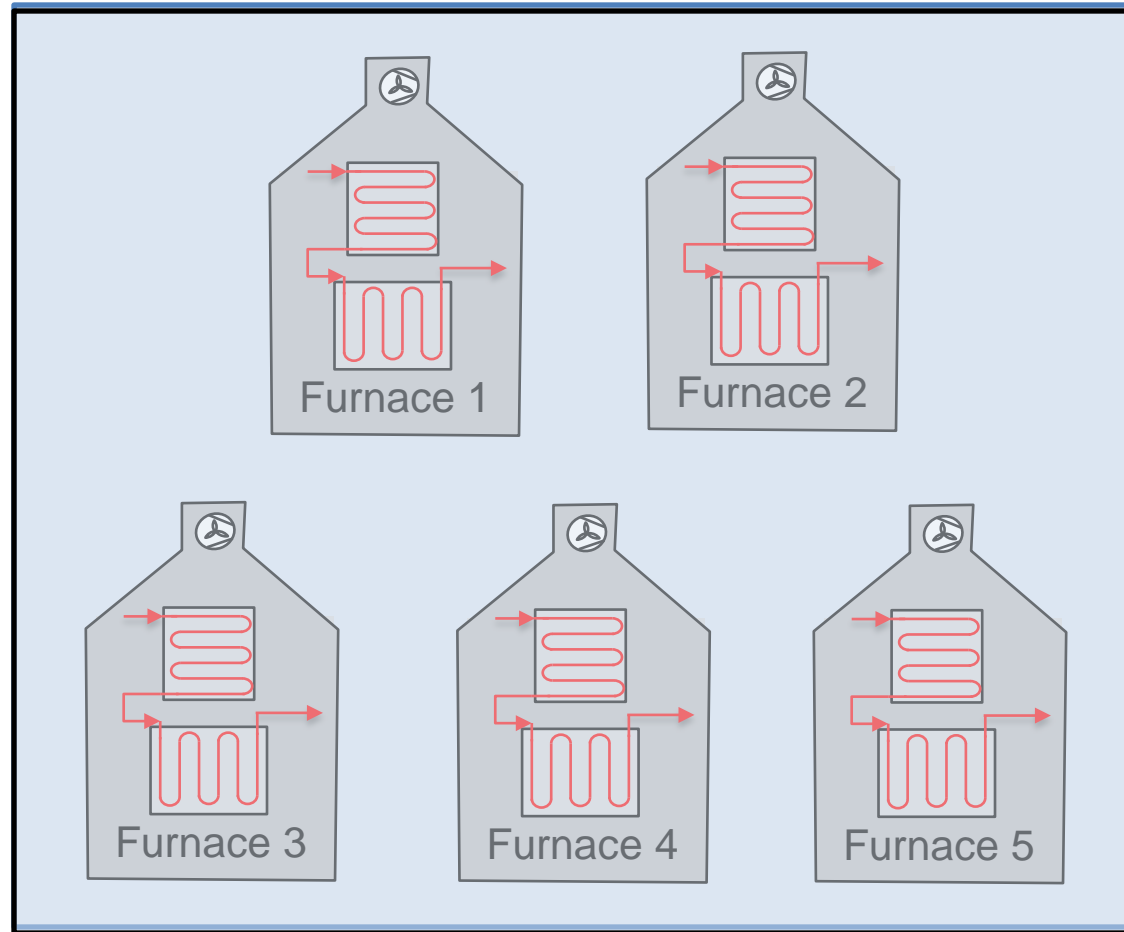
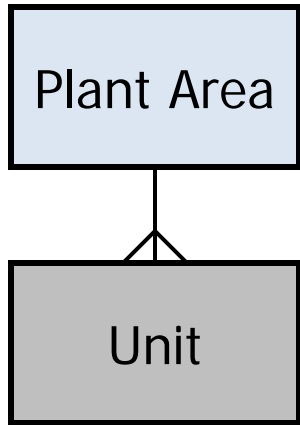
| | ISA-106 | Chemical Company | Oil Refinery | Offshore Oil Platform Example 1 | Offshore Oil Platform Example 2 | Paper Industry |
|------------|------------|------------------|--------------|---------------------------------|---------------------------------|----------------|
| Enterprise | Enterprise | Enterprise | | | Field | |
| Site | Site | Site | Site | Platform | Platform | |
| Plant | Plant | Plant | Complex | | Package | Mill |
| Plant Area | Plant Area | Area | Plant | | | |
| Unit | Unit | Unit | Unit | | | |
| Equipment | Equipment | Equipment | | | | |
| Device | Device | Device | Device | | | |

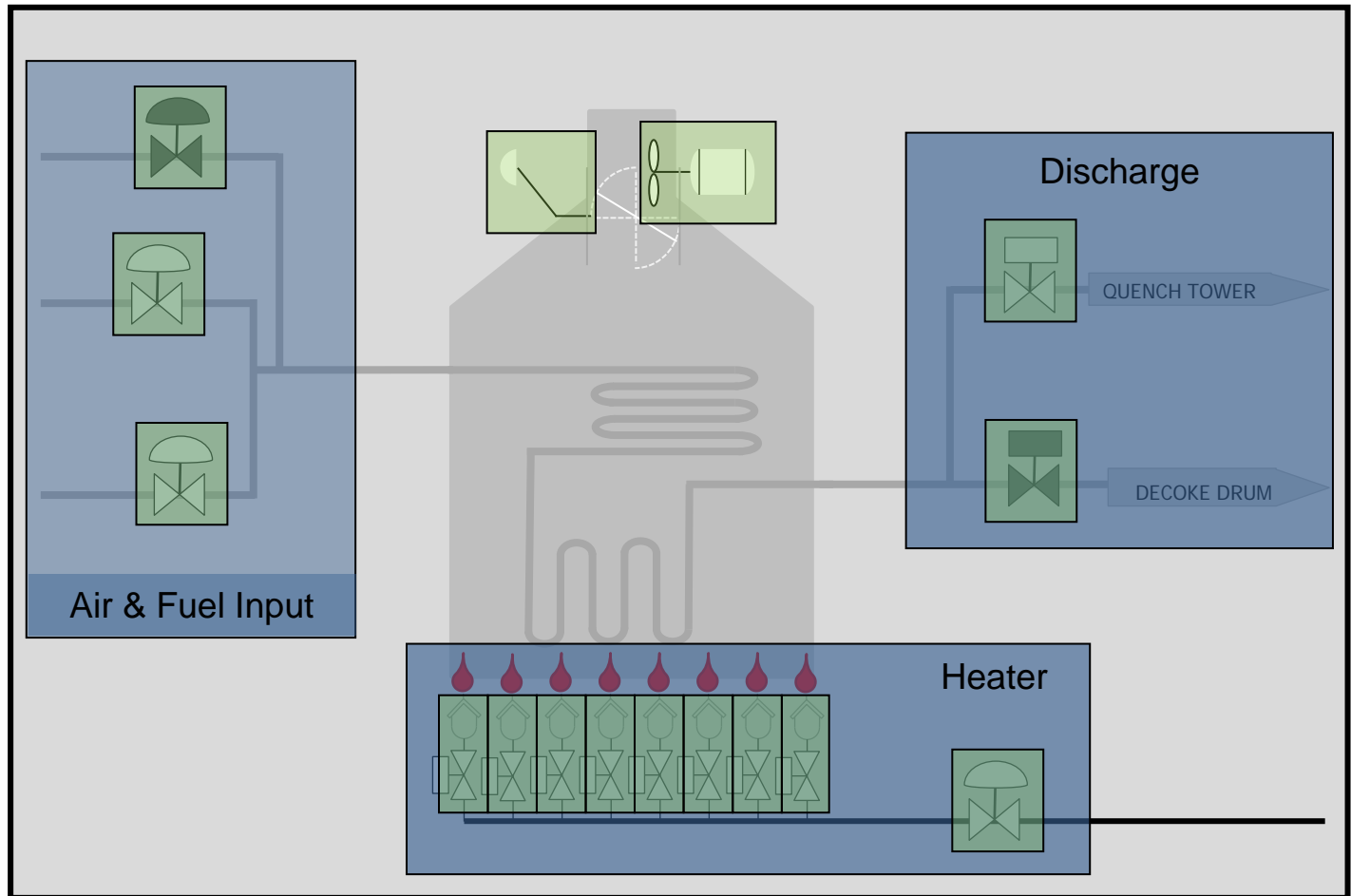
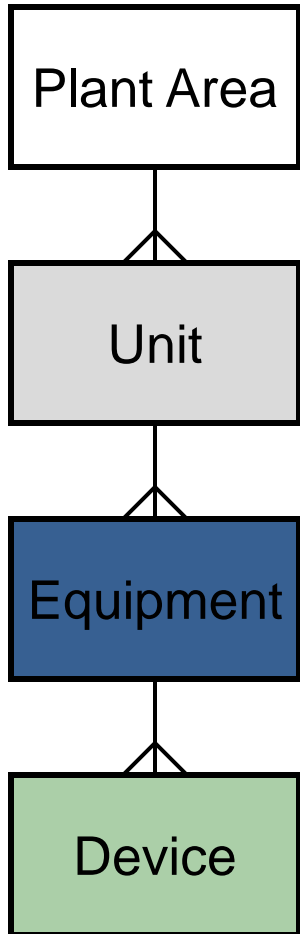


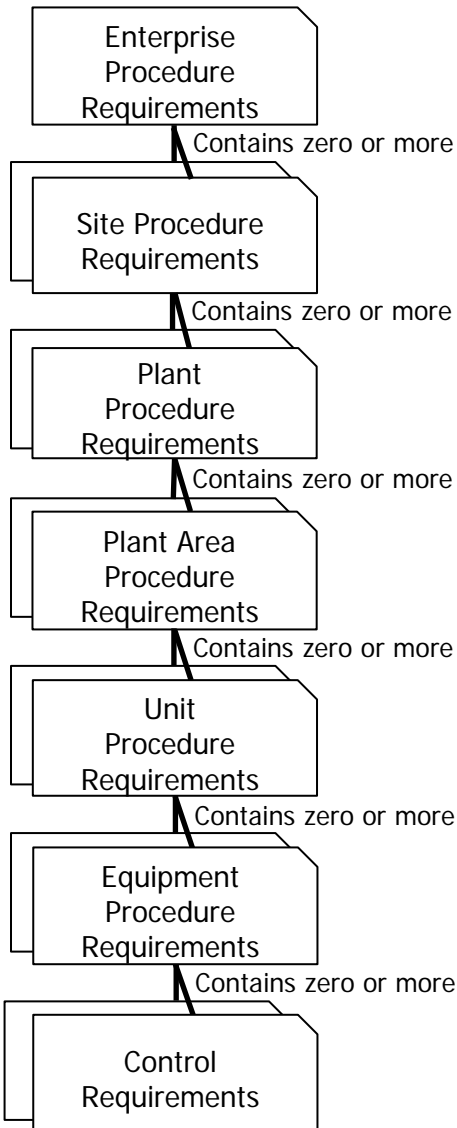
Results of committee owner/operator terminology

| | | | | | |
|-------------------|-------------------------|--------------------|---------------------------|--|----------------------|
| Enterprise | Corporate | Division | Business Unit | | |
| Site | Complex | Train | Facility | Verbund | Field |
| Plant | Platform | Train | | | |
| Plant Area | Separation Injection | Train Utilities | Sub-sea Water Treating | Gas Compression Production Manifold | Dehydration Wells |
| Unit | Separator | Dry/Wet Oil Tanks | Pipeline Pumps | Hydrocyclone | Compressor |
| Equipment | Pump Set | Feed System | Reboiler | Sampling System | Compressor |
| Device | Control Valve | Transmitter | Pump | Analyzer | |

Ethylene Furnace Example

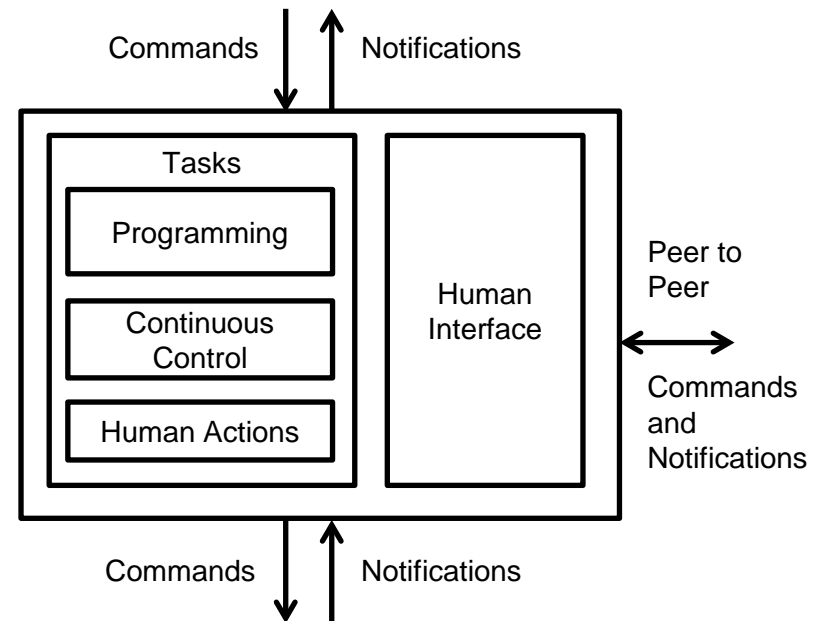
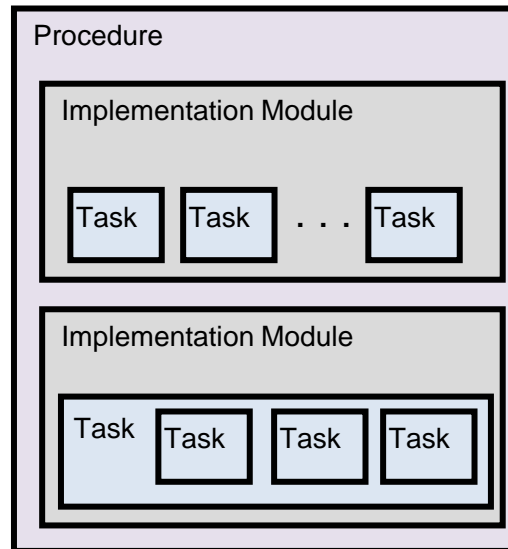
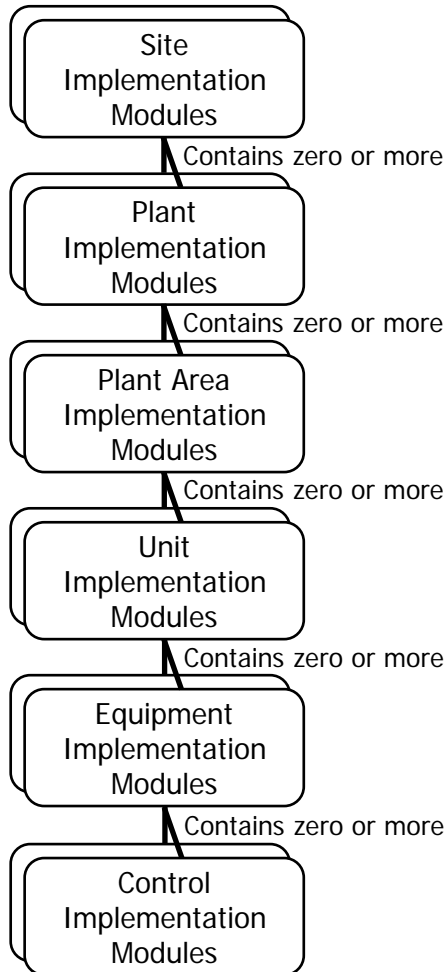


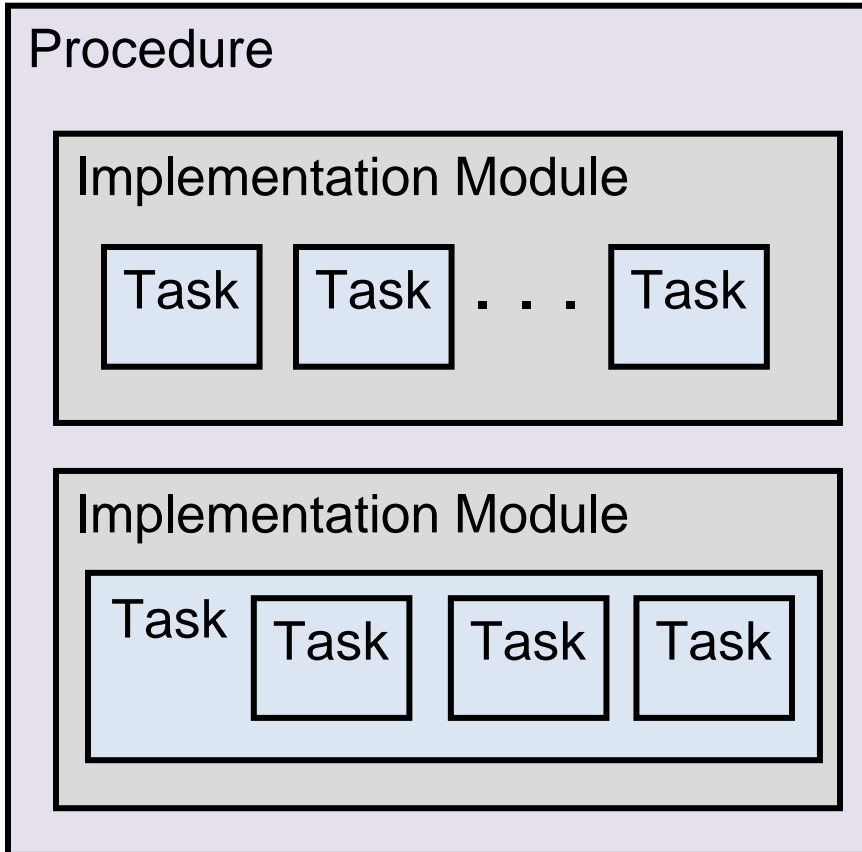




- ❖ Procedures are associated with objects in the physical model
 - Most common for units, equipment and devices
- ❖ Definition of the procedure
 - Actions that must be done to accomplish an objective
 - Functional requirement for the automated procedure

- The actual automated procedure
 - Program, function block, sequential function chart, flowchart,...
- The design of implementation modules is an engineering process

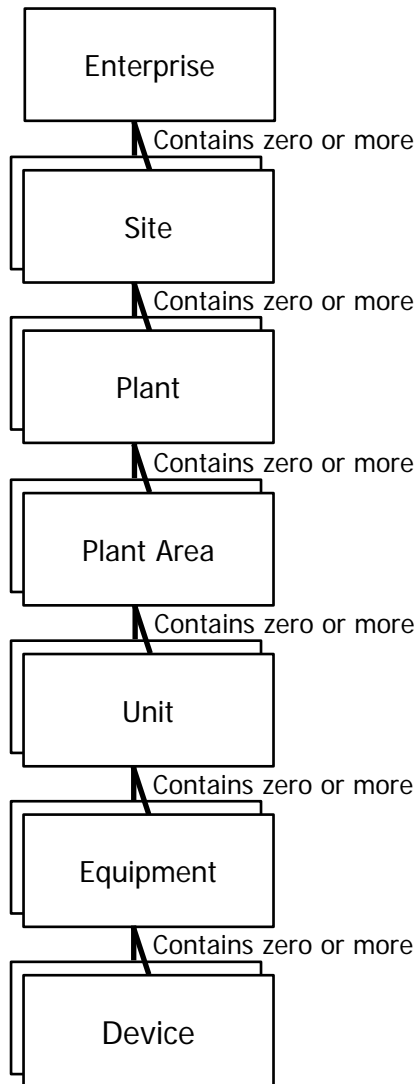




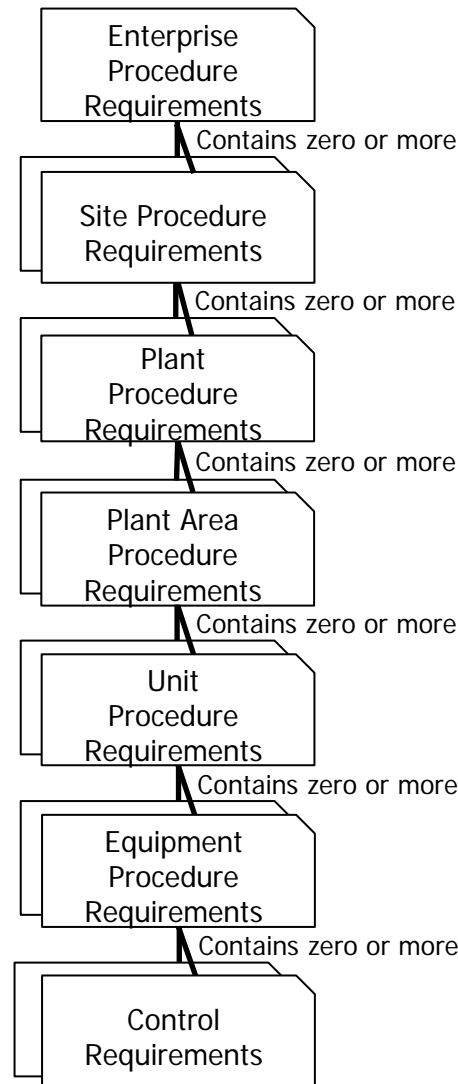
- Each Procedure, Implementation Module & Task has 3 execution work items
 - **Command** – Trigger
 - **Perform** – Actions
 - **Verify** – Success/Failure
- Computer/Human Mix
 - C-P-V work items can be done by a computer or human

Command >>>> **Perform** >>>> **Verify**

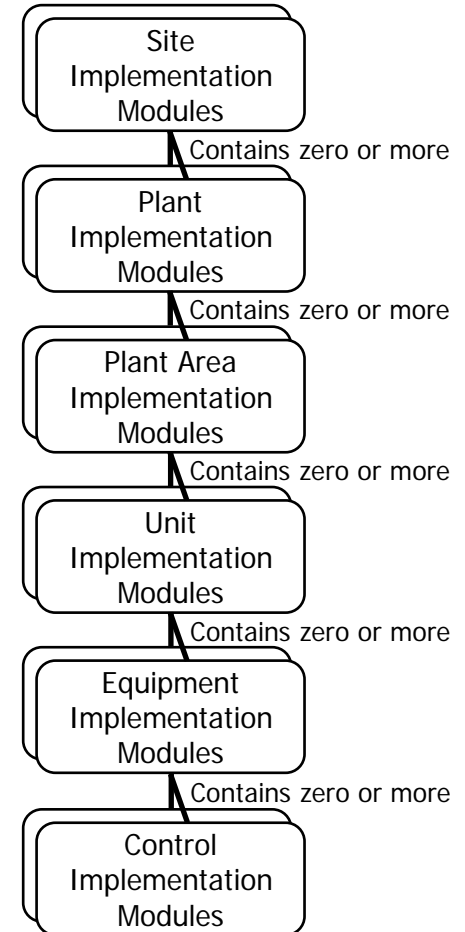
Physical Model



Procedure Requirements Model



Procedure Implementation Model



| Operator Notification Types | Operator is expected to take an action | Operator might need to be aware but is not required to take action |
|---|--|--|
| Arises from an abnormal process or equipment situation (ISA-18.2) | Alarm | Alert |
| Arises from a normal situation (ISA-106) | Prompt | Status Notification |

ISA106 has worked with ISA18.2
which has published an alarm management standard

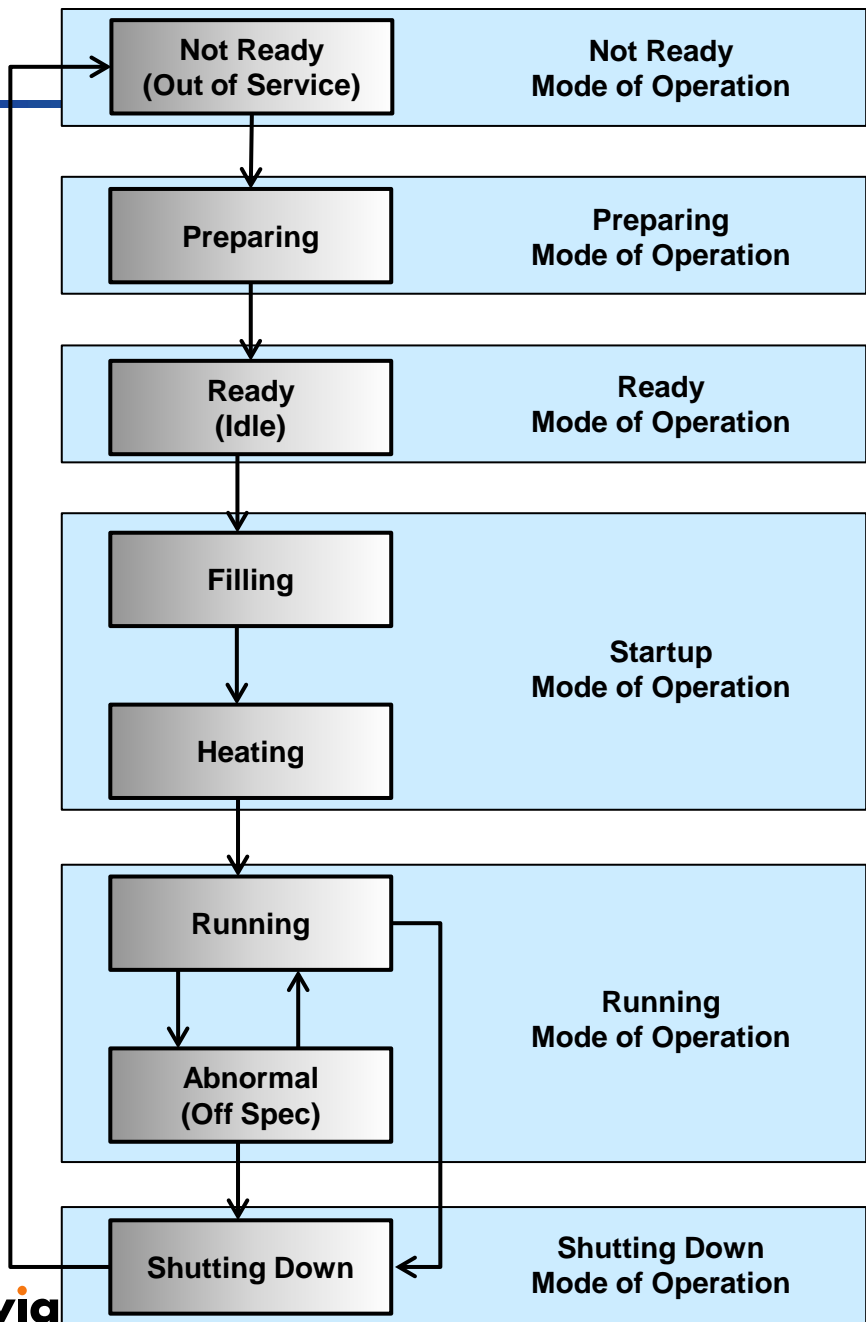
❖ Examples of Automation Styles

- Organization of the structure of the implementation module such as using procedure sections or process states
- Use of computer or operator action for command, perform, verify
- Amount of precision used for verification
- Human machine interface philosophy
- Degree of automation from minimal automation to complex automation

| Example Automation Style | Example Description |
|--------------------------|--|
| Manual | The Operator is responsible for the command, perform and verify work items, minimal automation is used |
| Computer Assisted | Operator and computer share responsibility for the command, perform and verify work items. The amount of automation used may vary. |
| Fully Automated | Computer is responsible for the bulk of the command, perform and verify work items. |

- ❖ A plant automation control design technique that assigns process states and defined transition procedures
 - Most effective at the unit level
 - Provides a high degree of automation
 - Startup, Shutdown, Transitions, Abnormal Situation Responses

State-based Control Example

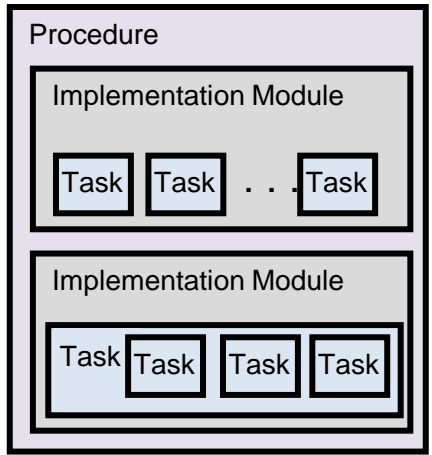


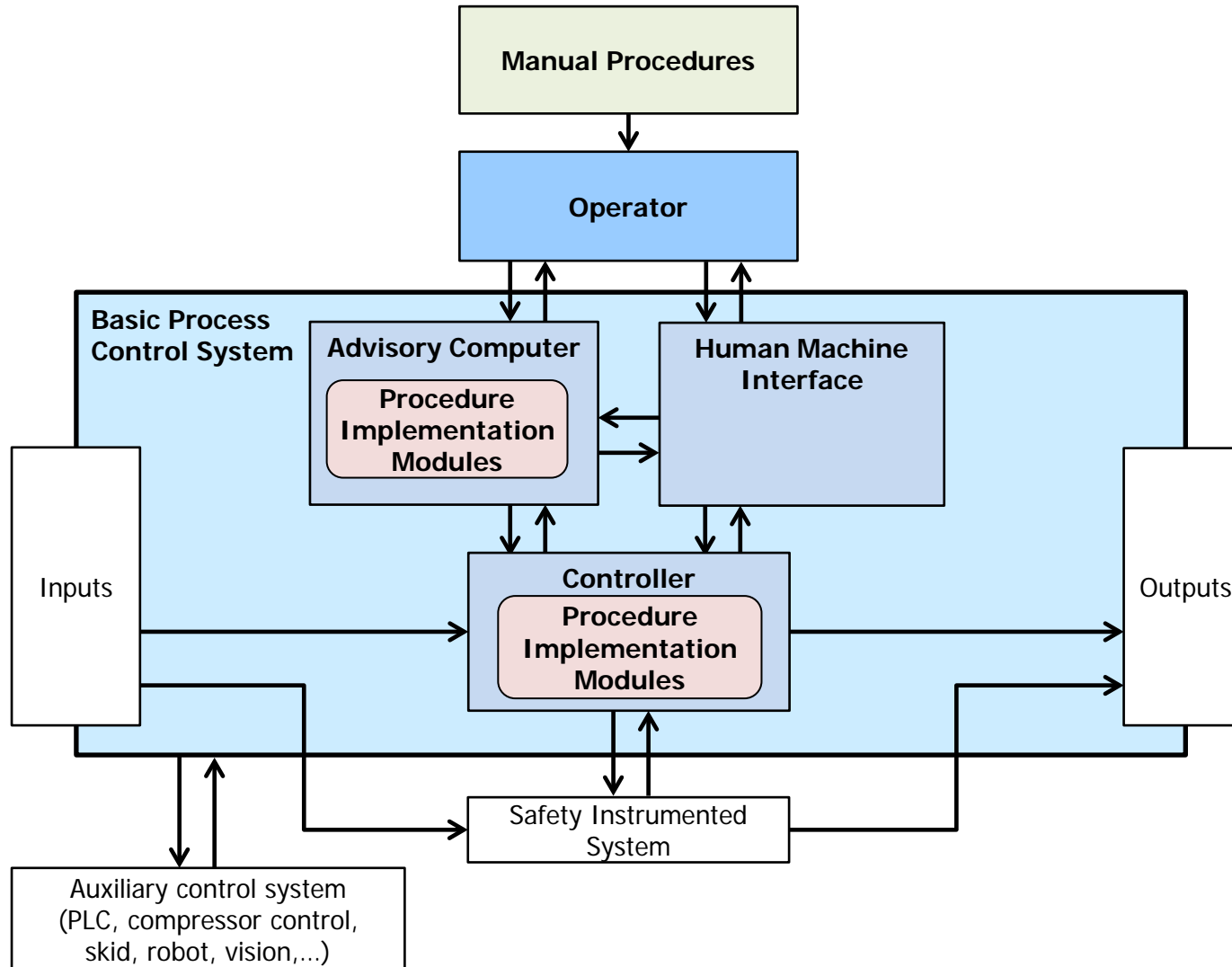
Prepare Procedure

Startup Procedure

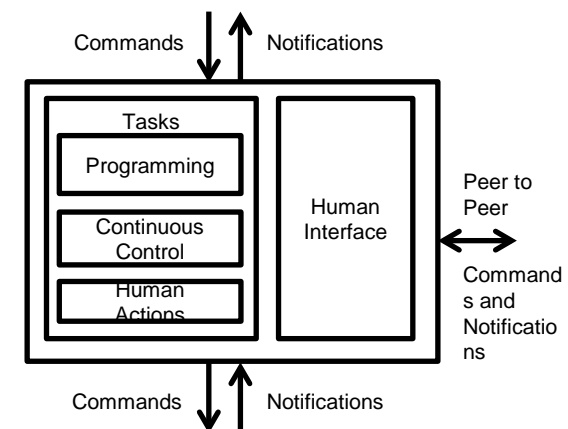
Production Rate of Change Procedure
Abnormal Condition Handling Procedure

Controlled Shutdown Procedure





- ❖ Location is based upon safety, risk, cost and benefit.
- ❖ Criteria include:
 - Risk
 - Response time requirements
 - Operating philosophy for operator interaction with procedures
 - Availability of instrumentation to perform automated tasks
 - Implementation cost
 - Procedure lifecycle cost
 - Desire for incremental implementation of automated procedures

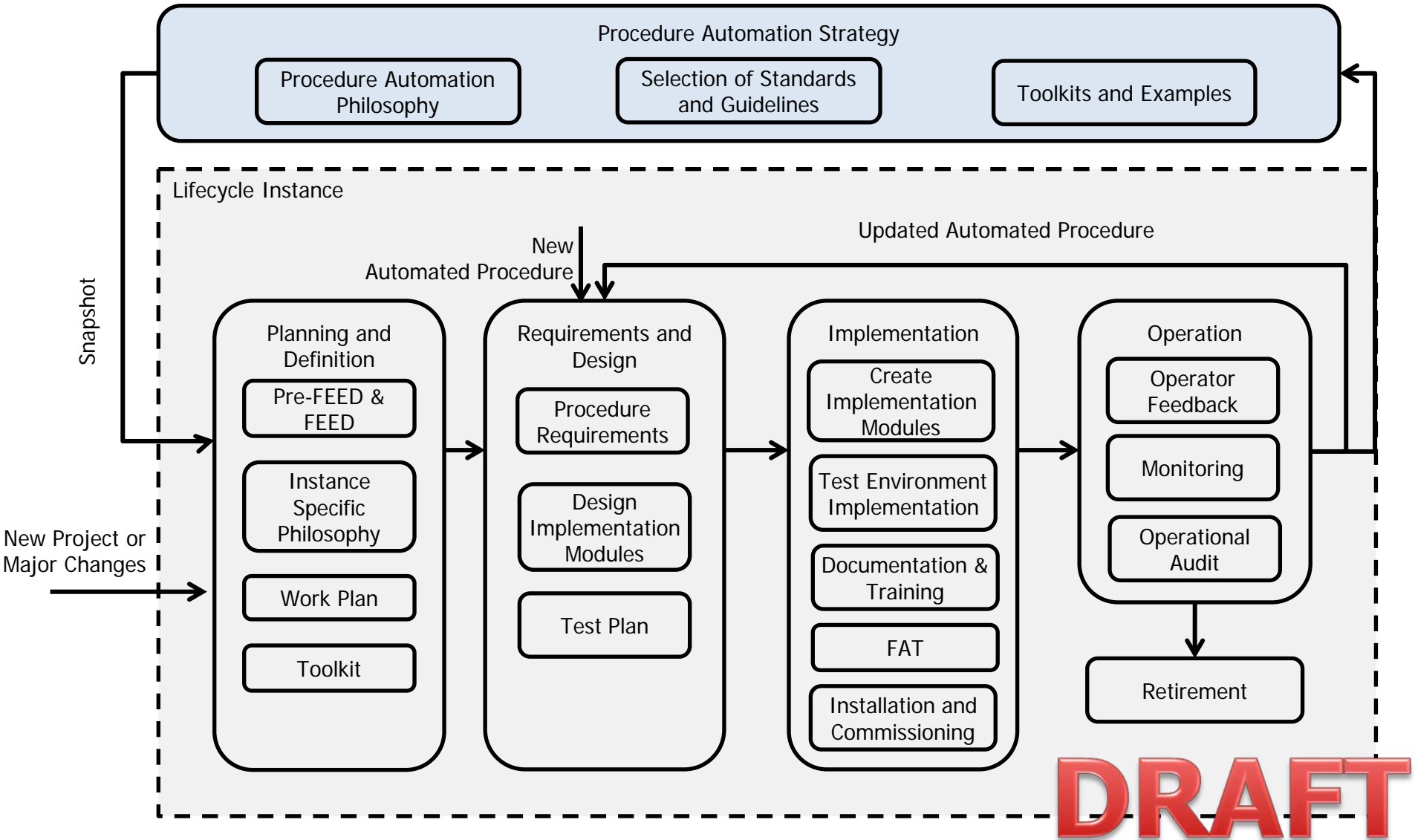




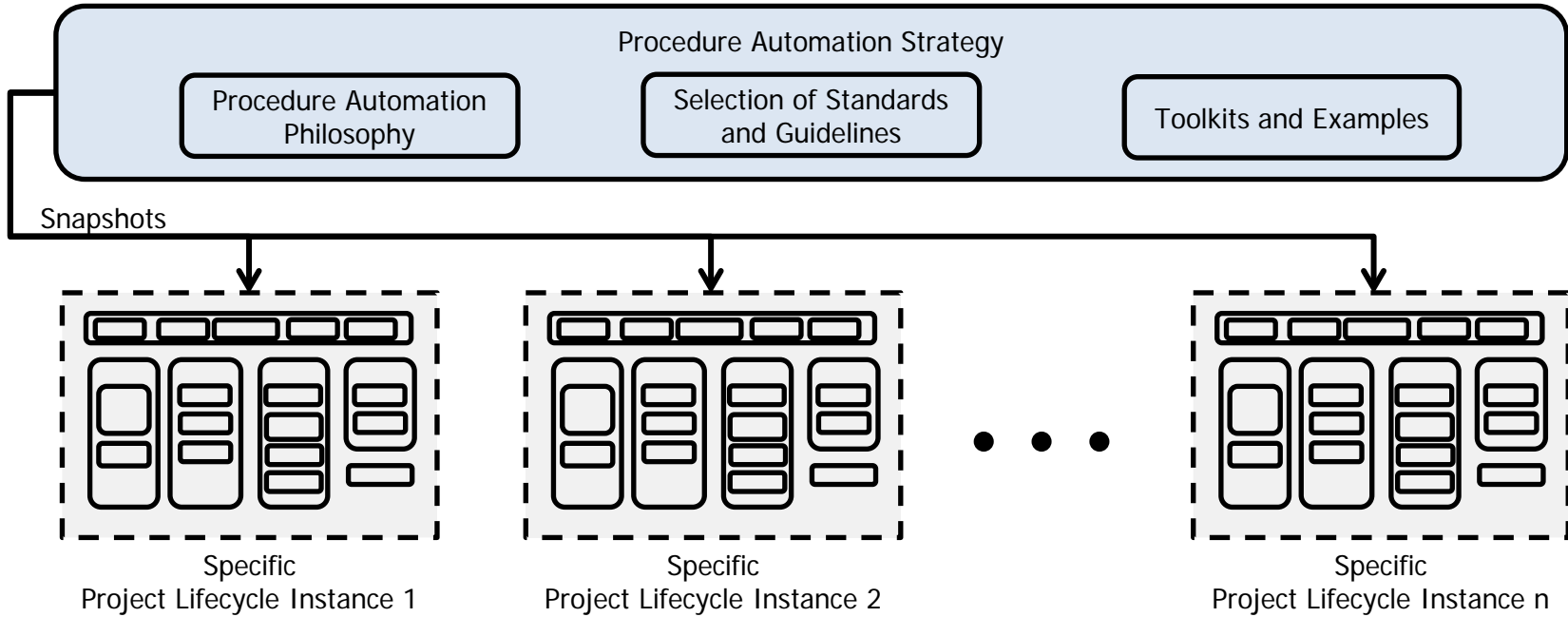
ISA-106 Technical Report 2

Procedure Automation for Continuous Process Operations – Work Processes

- ❖ States committee's current thinking on how to organize and approach procedure automation
- ❖ Models
 - Concepts to give the industry a common mental model for automated procedures
- ❖ Terminology
 - Definitions to give the industry a common language for automated procedures



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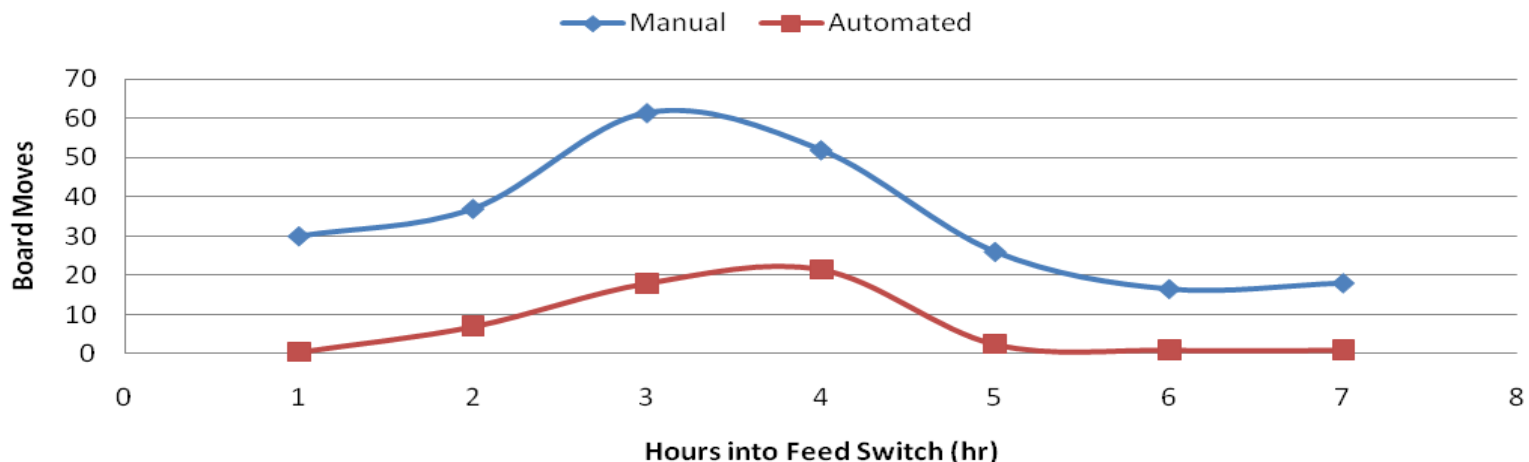


Examples

❖ Opportunity to automate a feed switch

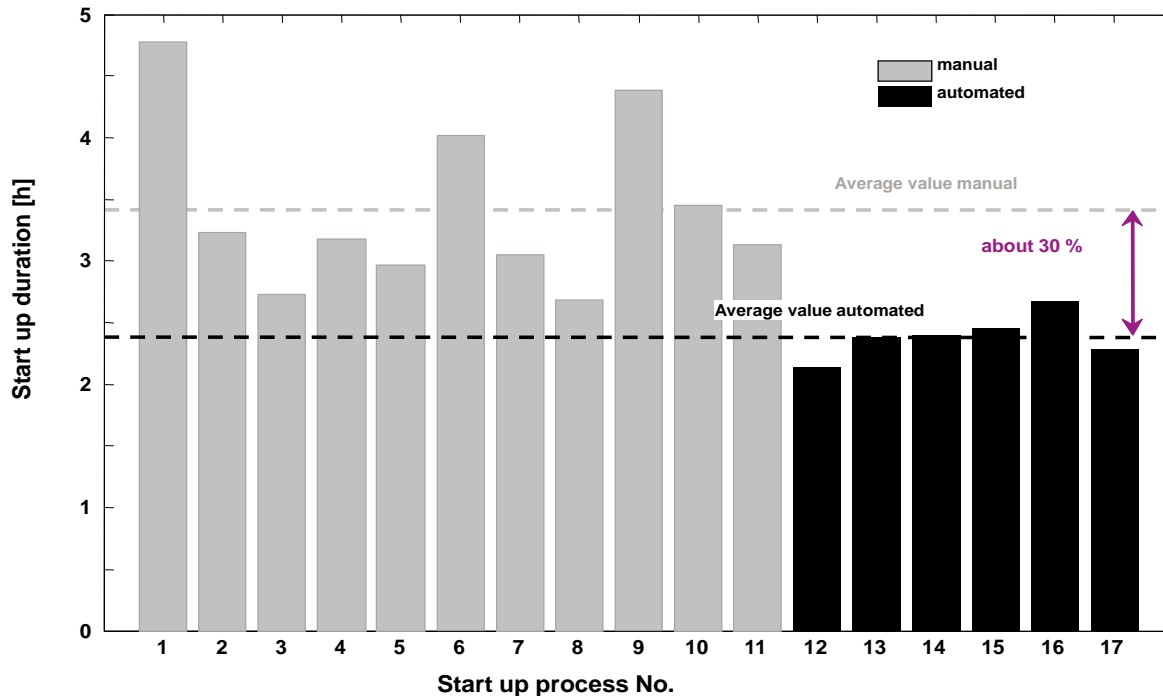
❖ Benefits:

- Operator workload reduced by 60%
- A 42% reduction in product yield loss
- Increased feed throughput during transition by 18%
- Reduced feed switch transition time by 36%



Console Operator Moves per Hour Comparison from paper “Improving Refinery Unit Transitions Using Process Automation Technology in a base Oil Hydroprocessing Facility. AIChE Spring 2011 Robert M. Tsai, Chevron, Richmond, CA

Start up procedure of a column



- ❖ Start-up time to steady state was reduced by 30%
- ❖ Less variability in start-up time
- ❖ Reactors able to come on stream 70% faster
- ❖ Process safety margins, of explosive conditions during startup, were significantly increased

NPRA 2011: AM-11-67 New Developments and Best Practices in Automating Procedural Operations for Continuous Processes

- ❖ Define the opportunity
 - Consistent Well Ramp Up procedure will minimize the amount of time required to get to full production
 - Remove the variance between crews and experience level of operators
- ❖ Measure how Currently Executed
 - Historical data indicated that Ramp Up time was not the same for different operating crews.
 - Ramp Up time took longer than estimated and times varied significantly.
- ❖ Analyze information and determine opportunities for improvement
 - One Operator manages multiple wells.
 - Written procedure not up to date with current practices.
 - Well Choke movements based on fixed clock time.
 - Varying levels of experience with more than one method used for Ramp Up.



❖ Improve the Procedure

- Develop one updated operating procedure with Operator input.
- Develop Exapilot procedure as a tool to aid Operator
 - Allow the Operator to easily manage multiple wells
 - Determine when to make well choke changes based on pressure stability criteria rather than a fixed time.
 - Dynamic simulator used to validate procedure steps.
 - Exapilot integrated into 3rd party process control system.
- Exapilot procedure will leverage the knowledge of the experienced Operator so that new Operators are able to achieve improved results.

❖ Control the Process to Ensure Repeatability

- Implement Exapilot Modular Automated Procedure in operating environment
- Training of Operators on new procedure. Operators should understand how the automated procedure makes decisions and executes steps.
- Monitor results and develop metric to monitor performance.

Procedure Commands

Advance Step

W-2. Procedure Status

RUNNING

PRODUCTION WELL 2 - Exapilot Ramp Up Procedure

| | Time | Message |
|-------------------------------------|----------|--|
| <input checked="" type="checkbox"/> | 10:33:49 | W-2 Flowing Tubing Pressure Stable |
| <input checked="" type="checkbox"/> | 10:22:43 | W-2 Ready to start ramping open. |
| <input checked="" type="checkbox"/> | 10:22:33 | W-2 Open PCV to minimum Open position. |
| <input checked="" type="checkbox"/> | 10:22:24 | W-2 Use Water Cut to determine required LDHI dosage rate |

11:06:50 AM

Previous

Valve Label

North Hdr Overview

South Hdr Overview

10:06:54 AM 8831 psi
 10:30:23 AM 7950 psi
 -881 psi (0 days, 00:23:29)

7395.1 PSI
184.1 Deg F

12.2 % Calc
11.7 % SP

7394.2 PSI
183.4 Deg F

8543.5 PSI
39.2 Deg F

14661.0 PSI
206.0 Deg F

3545.2 PSI
203.3 Deg F

3032.8 PSI
PFL-04
781.0 PSIG

3529.0 PSI
PFL-03
790.4 PSIG

1766.1 PSI
TFL-02
780.9 PSIG

Well Duty

Production ■

Well Interlocks

In Service ■

Zoom + Default Freeze Pan L Pan R

Zoom - Set Scale Current FTP 7395.1

20 Hr 16 Hr 8 Hr
4 Hr 1 Hr 1/2 Hr

Re-Scale

Drawdown Calc

30 Min 60 Min

dP 185.2 1435.

FTP Change 962.61
Topside FL 790.35
Stability Calc <1 0.0261

Stability Tmr 3 : 0
Curr Step Tmr 46 : 30
Total Ramp Tmr 1 : 17 : 10

Prod Mnfd Test Separator

Procedure Commands

Advance Step

W-2 Procedure Status

RUNNING

PRODUCTION WELL 2 - Exapilot Ramp Up Procedure

| ✓ | Time | Message |
|-------------------------------------|----------|------------------------------------|
| <input checked="" type="checkbox"/> | 10:33:49 | W-2 Flowing Tubing Pressure Stable |
| <input checked="" type="checkbox"/> | 10:22:43 | W-2 Ready to start ramping open. |
| <input checked="" type="checkbox"/> | 10:22:22 | W-2 C... P... .. |
| <input checked="" type="checkbox"/> | 10:22:22 | W-2 C... P... .. |

Confirmation Messages

Time of occurrence: 10:47:29 Time of acknowledgment:

W-2 Downhole Pressure Stable

W-2 Downhole Stable at 18051.0 PSIG, 210.0 DegF Topsides at 780.95 PSIG
 Cur step 23 Min, 0 Sec Press Drop 2180.0 PSIG
 Total 23 Min, 0 Sec Total Press Drop 2180.0 PSIG

Select one

Next Stability Check End Well Ramp.

OK Cancel

11:06:50 AM

Previous

Valve Label

North Hdr Overview

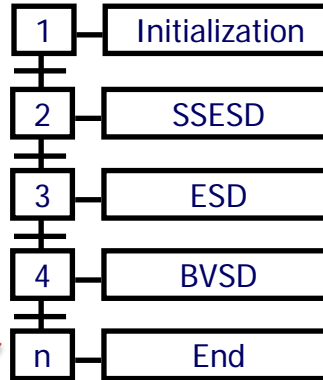
South Hdr Overview

| | | | | |
|----------------|-----------|---------|----------------------------|-------|
| Zoom + | Default | Freeze | Pan L | Pan R |
| Zoom - | Set Scale | Current | FTP 7395.1 | |
| 20 Hr | 16 Hr | 8 Hr | FTP Change 962.61 | |
| 4 Hr | 1 Hr | 1/2 Hr | Topside FL 790.35 | |
| Re-Scale | | | Stability Calc <1 0.0261 | |
| Drawdown Calc | | | Stability Tmr 3 : 0 | |
| 30 Min 60 Min | | | Curr Step Tmr 46 : 30 | |
| dP 185.2 1435. | | | Total Ramp Tmr 1 : 17 : 10 | |

"One Unit Procedure" for Multiple Wells

Well # 8105

Well # 8106



| GENERIC NAME | TAG NUMBER ACTUAL UNIT | |
|--------------|---------------------------|----------|
| | QAY8105 | QAY8106 |
| PMV | PMV8105 | PMV8106 |
| PWV | PWV8105 | PWV8106 |
| XOV | XOV8105 | XOV8106 |
| PCV | PCV8105 | PCV8106 |
| CID1 | CID18105 | * |
| CIT2 | * | CIT28106 |

Unit
(for QAY8105)

Unit
(for QAY8106)

Smart-Parts
I/O Layer (From TPU)

Smart-Parts
I/O Layer (From TPU)

Instrumentation per tree can be configured differently using "*" in the table if not required.

Decoking Procedure

FURN_1
FURNACE 1 DECOKE

PASSFLOW SETPOINT: 74000 SCFM

20.0 %

DECOKE AIR: FIC100 P1508 51584 SCFM CAS

STEAM: FIC101 P73471 574000 1b/hr CAS

HYDROCARBON FEED: FIC102 P0 52000 1b/hr MAN

PI105: 80 PSI

TI104: 800 °F

AI119: 15.500 %

TIC106: P1378 51391 °F AUT

FURNACE 1 MODE: MAN PROMPT SEMI AUTO

FURNACE 1 STATE: CRACK DECOKE STOP

DECOKE SUB-STATE: DECOKE PAUSE STANDBY

PHASE: AIR FLOW PHASE 1

STEP: WAIT FOR AIR FLOW

Confirmation Messages - [DECOKE_SEMI_AUTO]

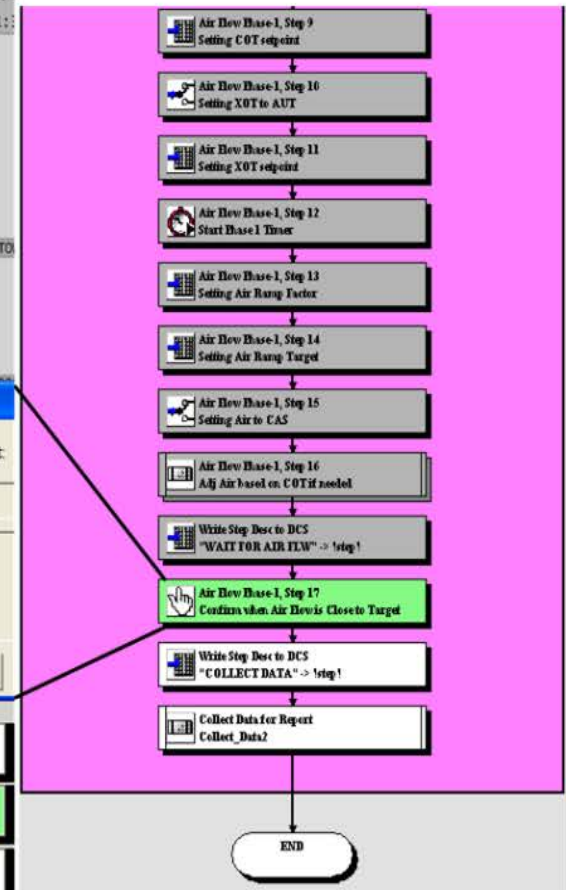
Time of occurrence: 15:31:02 23/04/2011 Time of acknowledgment:

Confirm when Air Flow is Close to Target

Confirm when Air Flow is Close to Target of 1584.0

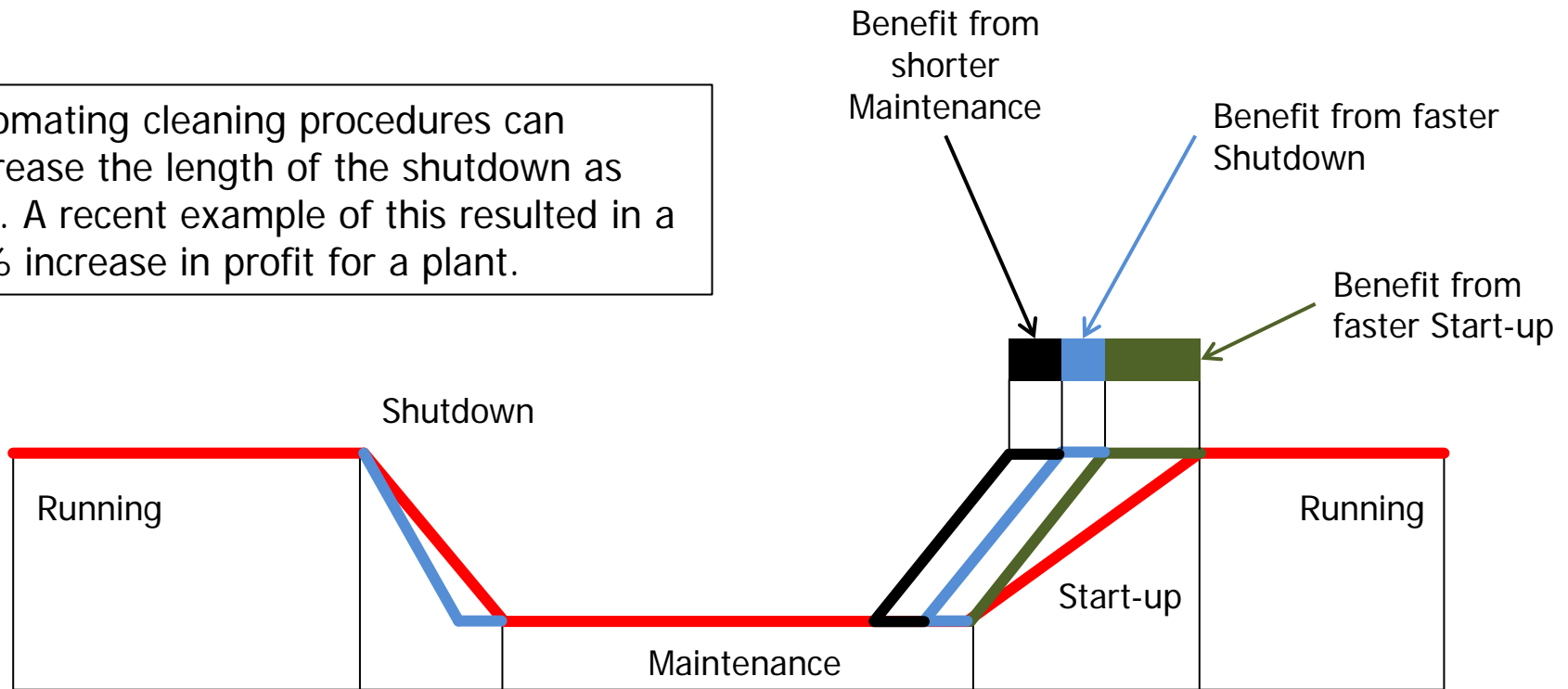
Locate Unit Procedure OK

| ✓ | Time | Message | Procedure | OperatingID | Subprocedure | PROMPTED |
|---|----------|------------------------------|-------------|-------------|----------------|-----------|
| ✓ | 15:31:02 | Confirm when Air Flow is Clo | DECOKE_SEMI | | Air_Flow_Phase | PROMPTED |
| ✓ | 15:29:29 | Close Quench Valve & Confirm | DECOKE_SEMI | | INIT_Phase | SEMI AUTO |
| ✓ | 15:28:54 | Open Decoke Drum Inlet Valve | DECOKE_SEMI | | INIT_Phase | |
| ✓ | 15:28:46 | Adjust Damper | DECOKE_SEMI | | INIT_Phase | AUTO |
| ✓ | 15:28:39 | How many Furnaces are in CR | DECOKE_SEMI | | INIT_Phase | |



- ❖ The Dow Chemical Company, at the 2011 ARC Forum, explained how state-based control provides them a financial benefit

Automating cleaning procedures can decrease the length of the shutdown as well. A recent example of this resulted in a 16% increase in profit for a plant.



Yahya Nazer, Ph.D. and Eric Cosman, The Dow Chemical Company, ARC Forum 2011

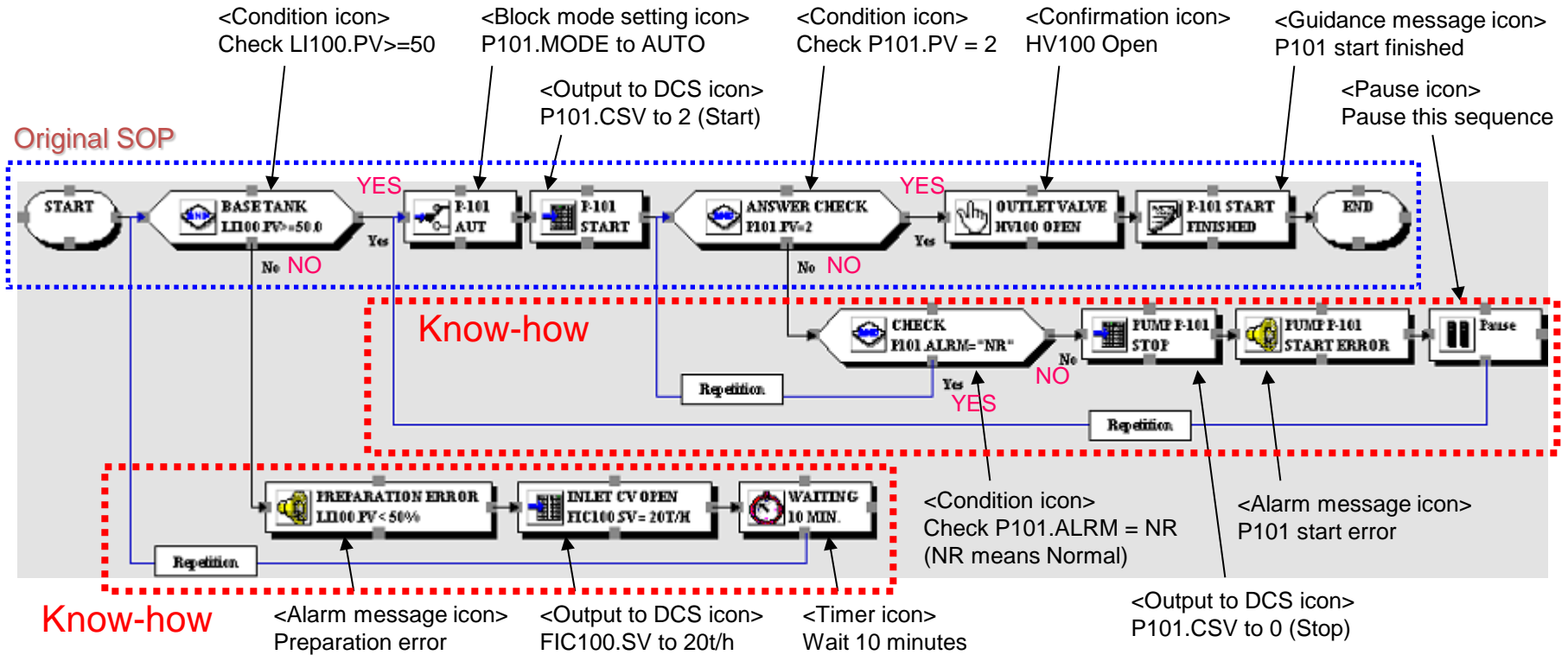
- ❖ Procedures can guide and prompt operator
 - Command – operator decides when to take action
 - Perform – board operator performs control actions
 - Verify – computer or operator can verify actions successfully done
- ❖ Can help new operators become more confident and have constant backup
- ❖ Analysis of procedure execution can identify areas of variability
 - Good candidates for full automation



Original SOP (Standard Operating Procedure)

- (1) Check base tank level LI100.PV $\geq 50\%$
- (2) Start pump P-101
- (3) Check answer back flag
- (4) Confirm field operator to open hand valve HV100

Capture Operator Knowledge!



- Provide if-then-else scenarios to respond to alarms based on the process conditions or changes made by the operator

The screenshot displays the Exapilot software interface for handling an alarm. The main window shows a flowchart for the response to an alarm, and a log on the right side.

Response to Alarm
5-1 FIC002 HI Alarm

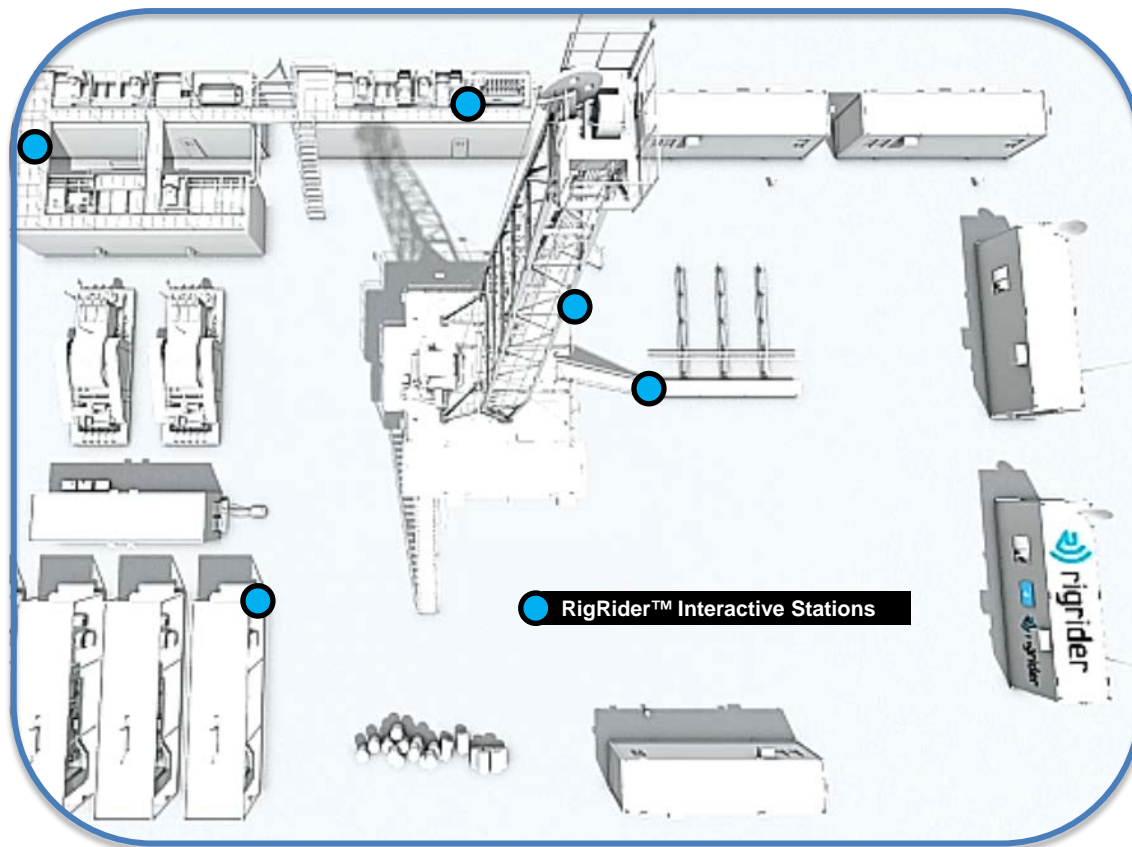
If this Alarm occurs, check & reduce the related flow FIC002A and FIC002B set point.

```

    graph TD
      START([START]) --> Step1[5-1-1 Check the FIC002A set point.]
      Step1 --> Decision{ }
      Decision -- Reduce --> Step2[SV 20% reduce  
SV=FIC002A.SV * 0.8]
      Decision -- Skip --> Step3[SV-> FIC002A.SV]
      Step2 --> Step3
      Step3 --> End([ ])
  
```

Message Log:

| Time | Message |
|----------|------------------------------------|
| 17:20:50 | 5-1-1 Check the FIC002A set point. |
| 17:20:23 | 5-1-2 Check the FIC002B set point. |
| 17:20:13 | 5-1-1 Check the FIC002A set point. |
| 17:19:30 | 5-1-2 Check the FIC002B set point. |
| 17:11:45 | 5-1-1 Check the FIC002A set point. |
| 15:14:34 | Check the FIC002B set point. |
| 15:14:14 | Check the FIC002A set point. |
| 12:52:49 | Starting TMP008. |



15 or 21 inch touch screen
with RFID reader to log-in

Rider Interactive Station (RIS) recognize and check the competence status of the specific person and presents a task list for the planned job.

Rider Personal on Board system



WELCOME, ABDUL WAHAB

NOTIFICATIONS

- IWCF CERTIFICATE EXPIRES ON 05-05-2013
- NEW SAFETY ALERT: SLIP & CUT
- REVIEW SLIP & CUT WAYBOOK

Rig: LR-08

| | | | | | |
|---------------------------------|-------------------------------|--------------------------|-----------------------|---------------------|----------------------|
| 6 GHULAM DRILLER | 7 MUHSIN ASSISTANT DRILLER | | | | |
| 13 HUMAID ROUSTABOUT FOREMAN | 14 NASSER ROUSTABOUT | | | | |
| 15 KHALID ROUSTABOUT | 16 MUBARAK ROUSTABOUT | 17 MAHMOOD ROUSTABOUT | 18 SAID GATE GUARD | 19 NASSER DRIVER | 20 KHALIFA WELDER |

Personnel on Board screen



Every person receives a RFID card to log in on the Rider Interactive Station (RIS)

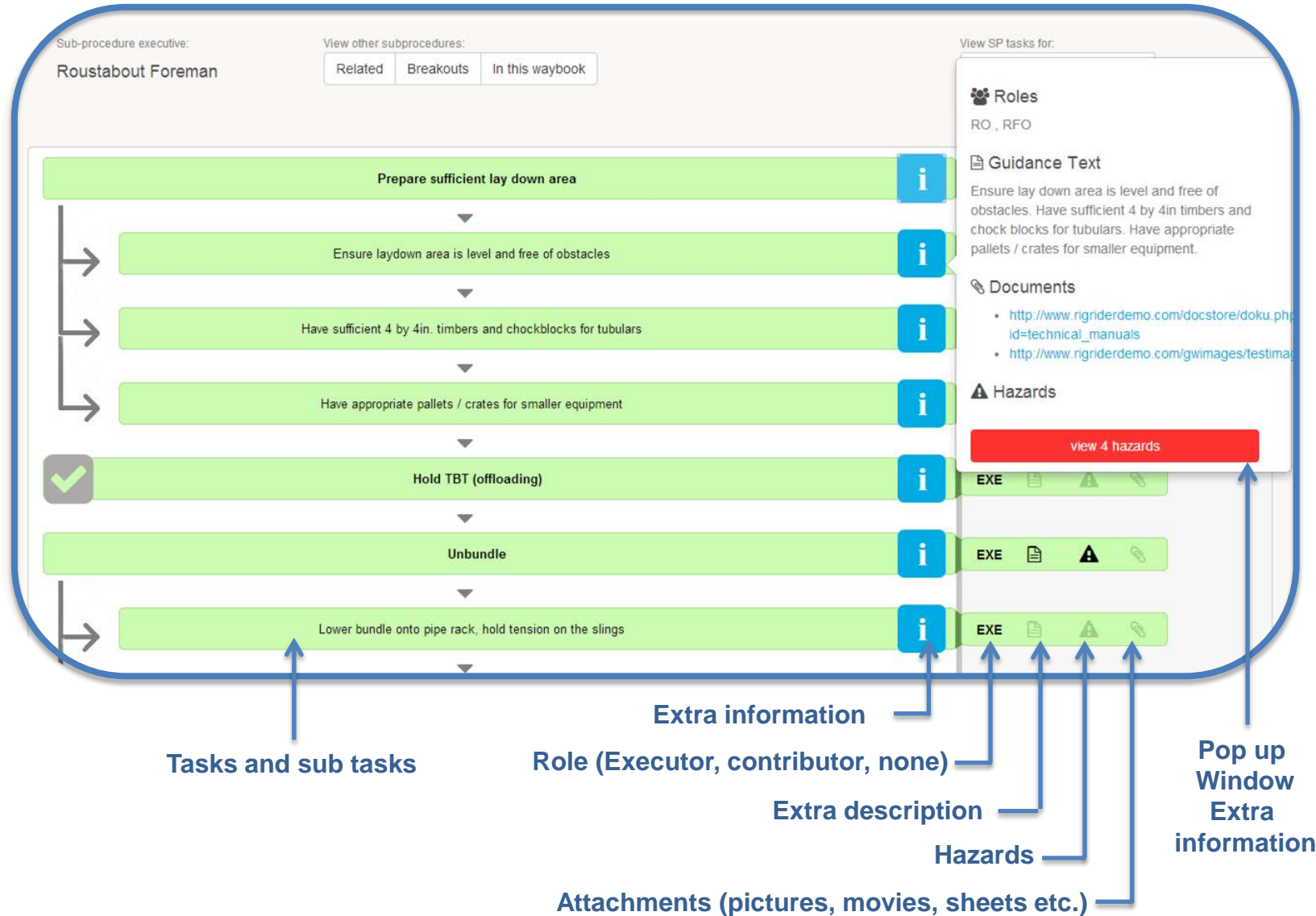
The screenshot displays the 'rigrider' software interface. At the top, there is a navigation bar with 'rigrider', a menu icon, and tabs for 'Tuition' and 'Notifications'. Below this, the 'Tuition' section is active, showing a dropdown menu set to 'Drilling Operations' and a link to 'Change filter settings for rig LR-02'. A pie chart in the top right corner shows competency levels: 2 Competent (green), 8 Conditionally competent (yellow), and 23 Not yet competent (red).

The main content area is divided into three columns, each with a search bar and a list of items. Yellow boxes and arrows highlight the navigation path:

- Choose textbook:** A search bar with the text 'search a textbook'. Below it, a link 'I WANT TO VIEW ALL WAYBOOKS' is visible. The list includes 'Casing and liner operations' (highlighted in blue) and 'Drilling operations'.
- Choose waybook:** A search bar with the text 'search a waybook'. Below it, a link 'I WANT TO VIEW ALL SUBPROCEDURES' is visible. The list includes 'Running casing' (highlighted in blue) and 'Tripping out and laying down casing'.
- Subprocedures:** A search bar with the text 'search a subprocedure'. Below it, a list of 8 subprocedures is shown, each with a colored indicator on the right:

| Subprocedure | Competency Level |
|--|------------------|
| 1. Prepare casing offloading, inspection and running | Yellow |
| 2. Offload casing | Yellow |
| 3. Inspect casing | Green |
| 4. Prepare for running casing | Red |
| 5. Rig up casing running equipment | Yellow |
| 6. Run casing and accessories | Green |
| 7. Land casing | Yellow |
| 8. Break circulation | Yellow |

Yellow arrows point from 'Choose textbook' to 'Choose waybook', and from 'Choose waybook' to 'Subprocedures'. A red arrow points from 'Subprocedures' to the word 'Task' and 'Next page'.



The screenshot shows a mobile application interface with a pop-up window titled "Hazards for 'Prepare sufficient lay down area'". The background is dimmed, showing a task list and a "go back" button. The pop-up window contains a table with four rows of hazard information, each starting with a numbered "Personal injury" category.

| Hazards for "Prepare sufficient lay down area" | | | |
|---|---|---------|---------------|
| 1. Personal injury | | | |
| EFFECTS | | CONTROL | SAFETY ALERTS |
| Tripping over tools and objects left lying on rig floor | N/A | | |
| 2. Personal injury | | | |
| EFFECTS | | CONTROL | SAFETY ALERTS |
| Body parts caught between nubbin and other objects | N/A | | |
| 3. Personal injury | | | |
| EFFECTS | | CONTROL | SAFETY ALERTS |
| Wicker from wire rope piercing hand | Impact gloves must be worn for this task. | | |
| 4. Personal injury | | | |
| EFFECTS | | CONTROL | SAFETY ALERTS |
| Nubbin dropping while it is being hoisted to the rig floor. | Worker on the ground must stand clear of the area while the nubbin is being lifted up to the rig floor. | | |

- ❖ Yokogawa consulting service
- ❖ Work with you to
 - Asses the current state of standard operating procedures
 - Identify opportunities for automation
 - Capture best practices from most experienced operators
 - Automation team member

The screenshot displays the 'Explot Operation - Offline' software interface. The main window shows a vertical flowchart of steps for 'FR1_STARTUP'. The steps are: Step 3 Start Steam, Step 4 Check Accumulator level, Step 5 Check Feed Tank Level, Step 6 Start Feed and Bottoms, Step 7 Start Steam Condensate, Step 8 Start Reflux, and Step 9 Adjust Boiler Firing (highlighted in green). A red box highlights the steps from Step 3 to Step 9. To the right, a message log table shows the following entries:

| Time | Message |
|----------|---|
| 16:03:11 | Step-9 ADJUST boiler firing as needed. |
| 16:02:50 | START reflux. |
| 16:02:39 | Open control valve to flow 25lb/min |
| 16:02:24 | OPEN steam cond. block valves. |
| 16:02:13 | Step 6.5 MAINTAIN feed and bottoms level! |
| 16:01:38 | Step 6.3 START Feed Pump |
| 16:01:22 | Step 5 VERIFY feed tank level at or above 80% |
| 16:01:16 | STEP 4 VERIFY accumulator at 50% or less |
| 16:01:05 | Step 3.1 SET Steam Pressure Target. |
| 16:00:18 | Steps 2.6 - 2.9 |
| 16:00:08 | Steps 2.1 - 2.5 |
| 15:59:57 | Step1: Tighten Condenser, Reboiler and Window Bolts |
| 15:59:51 | Starting FR1 STARTUP. |

Below the message log, a 'Confirmation Message - [FR1_STARTUP]' dialog box is visible, showing the time of occurrence (16:03:11 21/12/2011) and the message text: 'Step 9 ADJUST boiler firing as needed.' and 'SET boiler to Manual or Auto as needed.' The dialog includes buttons for 'Locate Unit Procedure', 'OK', and 'Cancel'.

- ❖ Participate on the ISA106 committee
 - Have input to the standard
 - Receive copies of the draft standard
 - Contact Dave Emerson or Bill Wray, or any committee member
- ❖ How can the ISA-106 procedure automation concepts be used in your plant?
 - Yokogawa Advanced Solutions group is available to talk about this



Thank-You