# 5- YEAR LONG-TERM DATA MANAGEMENT ACTIVITY WORK PLAN

***Changes to this Work Plan are only accepted via an Approved Addendum.***

| **General Information** | | |
|---|---|---|
| **Monitoring Category:**<br>*(From OSM long-term plan; choose from drop-down menu)* | Standards, QA/QC, Data Mgt. | |
| **Strategic Monitoring Objective:** *(From OSM long-term plan; choose from drop-down menu)* | Objective: Establish and Maintain an Integrated Data Management System for Archiving and Retrieval of Oil Sands Monitoring Program data. | |
| **Work Plan Unique Identifier:** | *D-4-1718* | |
| **Monitoring Activity Title:** | AEP Asset Management System (including consumables) | |
| **Geographic Location (***choose from drop-down menu, if Project Location is in more than one area choose from second drop-down***)** | Location Not Applicable | |
| **Monitoring Site(s) Coordinates** *(latitude and longitude)* | N/A | |
| **Monitoring Organization and Responsible Manager:** | Alberta Environment and Parks | Rita Lazar-Tippe |
| **Date Activity initiated:** | **2017** | |
| **Specific Project Objective:**<br>*(State the activity objective)* | It is expected that the asset management system will be in production in Q4 of 2017-18. The system will manage the full life-cycle of the OSM asset management (including consumables); asset deployment, inventory monitoring and consumables tracking, preventative maintenance, track operational costs, asset redeployment and asset retirement. The asset management system will contribute to the evolving maturity and best practices of asset management within EMSD.<br>The anticipated outcome is to efficiently, effectively and proactively manage OSM monitoring assets (including consumables). To mitigate downtime and data gaps and to ensure our monitoring workforce is managing assets (including consumables) in an effective and efficient manner. This system will provide one source for all asset (including consumables) information and will be leveraged by various EMSD systems for the OSM program. | |

| **Deliverables (Annual):** | |
|---|---|

| *Milestone/ Deliverable* | | *Start Date* | *Expected Completion Date* | *Human Resources (identify who and how many staff are delivering the activity)* |
|---|---|---|---|---|
| **Deliverables (provide enough information to support status reporting)** | | | | |
| **Q3 – October to December** | | | | |
| 1. | Discovery:<br>To assess and conduct a full inventory (including consumables) | Sept. 11, 2017 | Sept. 29, 2017 | Lead by Rita Lazar-Tippe<br><br>PM – Elis Valera, SA – Jon Manuel / Massie Kitagawa<br><br>SME – John Willis and Marty Collins |

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|---|---|---|---|---|
| 2. | Core milestones and deliverables for the setup and implementation of the asset management system:<br>• Plan<br>  • Goals and objectives, deployment target audience, team members, timelines and milestones review, workshop scheduled<br>• Build<br>  • Core environment setup with foundational data imported, training and walk-through, resource module setup, asset modules setup, dashboards, technical infrastructure setup, create an initial asset management policy<br>• Asset Management Execution<br>  • Technical infrastructure setup, object model layout design, review and setup, data model layout design, review and setup, core module customization, custom module development and 3rd party integration, data migration of various data sources, operational reporting, dashboards, workflow automation<br>• Configuration, Administration and Security workshop<br>  • Administration setting and configuration, user security and roles, setup for deployment<br>• Executive reports and dashboards workshops<br>  Reports, filters, dashboards training, modify/create executive and management reports and dashboards | Oct. 1, 2017 | Dec. 22, 2017 | Lead by Rita Lazar-Tippe<br><br>PM – Elis Valera, SA – Jon Manuel / Massie Kitagawa<br><br>SME – John Willis and Marty Collins |
| **Q4 – January to March** | | | | |

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|---|---|---|---|---|
| 3. | • Train and Deploy<br>  • Asset management, preventative maintenance, basic workflow creation and alteration, mobile usage and capabilities<br>• Adopt<br>  • Post deploy adoption support and refinement, implementation review, dashboard review and closing implementation<br>• Post Implementation review<br>  • Dashboard review, usage review, lessons learned, future planning and roadmap<br>  • Update asset management policy | Jan. 2, 2018 | Mar. 31, 2018 | Lead by Rita Lazar-Tippe<br><br>PM – Elis Valera, SA – Jon Manuel / Massie Kitagawa<br><br>SME – John Willis and Marty Collins |

**Project Plan Summary**: *Please summarize the monitoring including relevant information such as background, objectives, monitoring area, methods/monitoring design, assumptions, outcomes, and references. These should align with the information provided in Appendix 1: Annual Monitoring Schedule.*

With EMSD shifting to bring OSM monitoring in-house, the monitoring assets (including parts and consumables) need to be properly managed and tracked. The current method of managing, planning and budgeting for monitoring assets and consumables is inefficient and operationally impactful. When monitoring equipment failure occurs, depending on manual investigation, tracking of other asset availability, availability of consumables etc., delays getting the monitoring equipment back on-line or appropriate consumables to provide functionality. The longer the monitoring equipment is off-line or consumables are a challenge, the bigger the data collection gap or turnaround time in accomplishing the monitoring objective.

The current way monitoring assets and consumables are managing consists of: various spreadsheets for inventory tracking, hand written notes, high error probability due to manual tracking (of preventative maintenance schedule and costs), it is extremely challenging to budget, forecast and plan for additional or replacement of equipment (including consumables). The total cost of ownership is not accurately tracked and the current manual method is outdated and no longer a viable way to manage the critical monitoring equipment and supplies.

By implementing the Asset management system, it will manage the OSM assets and consumables lifecycle and reduce asset downtime and data gaps, and streamline core capabilities within EMSD. The Asset management system will improve asset and consumables planning and sustainability, automation and mature processes to drive efficiency (fully accessible and usable through smartphones etc.), provide ease of asset and consumables tracking, transparency through ease of access real-time inventory, asset availability, redeploy to maximize usage and cost effectiveness. Therefore, monitoring teams have all pertinent information at their fingertips as well as provide the ability for real-time asset and consumables updates and information.

The 2012-2015 JOSM Integrity review – page 47 JOSM has not yet implemented a uniform QA approach across its activities and the panel found limited evidence of external AQ audits. By leveraging an asset management system, it would contribute to the QA and data integrity outcomes.

# Appendix 1 – Detailed Multi-Year Financial Breakdown: if changes are to be made then an Addendum must be Complete and Approved.

(Complete the following detailed financial breakdown; add or delete categories as required)

| Budget requirements | Year 1 (201X- 201Y) | | Year 2 (201X- 201Y) | | Year 3 (201X- 201Y) | | Year 4 (201X- 201Y) | | Year 5 (201X- 201Y) | |
|---|---|---|---|---|---|---|---|---|---|---|
| | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding |
| 1) Salaries and benefits | | | | | | | | | | |
| a) Lead (Non IT) ($ 100 / hour) | 10,500 | | | | | | | | | |
| b) Project Manager ($ 80 / hour) | 11,200 | | | | | | | | | |
| c) Trainer ($ 50 / hour) | 1,600 | | | | | | | | | |
| d) Lead (IT) ($ 100 / hour) | 3,500 | | | | | | | | | |
| e) Support Analyst ($80 / hour) | 5,600 | | | | | | | | | |
| 2) Operations and Maintenance | | | | | | | | | | |
| a) Asset Management System licenses subscription (based on licenses the $ amount will fluctuate). | 21,600 | | 21,600 | | 21,600 | | 21,600 | | 21,600 | |
| 3) Consumable Materials and supplies | | | | | | | | | | |
| a) (*Describe Consumable Supply*) | | | | | | | | | | |
| 4) Travel | | | | | | | | | | |
| a) Conferences and meetings (*identify conference/meeting*) | | | | | | | | | | |
| b) Field work - travel | | | | | | | | | | |

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|---|---|---|---|---|---|---|---|---|---|---|
| c) Project-related travel | | | | | | | | | | |
| 5) External Contracts | | | | | | | | | | |
| a) Asset Management Vendor (system design, setup, configuration, test and implementation) | 53,000 | | | | | | | | | |
| b) Enabling enhanced features, capabilities and workflow (if desired) | | | 40,000 | | | | | | | |
| **Grand Total** | 107,000 | | 61,600 | | 21,600 | | 21,600 | | 21,600 | |

# Appendix 2 – Staffing Plan

(Complete the following detailed staffing plan; add or delete categories as required)

| | Year 1 – Budget Allocation | | Year 2 – Budget Allocation | | Year 3 – Budget Allocation | | Year 4 – Budget Allocation | | Year 5 – Budget Allocation | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Responsible Role** | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding | OSM Funding | External Funding |
| **Science Expertise** | | | | | | | | | | |
| **Technical/Field Staff** | | | | | | | | | | |
| **Administrative and Program Coordination** | | | | | | | | | | |
| **Grand Total** (*inserted into Appendix 2*) | | | | | | | | | | **$** |

# Appendix 3 - Approvals

| **Project Submitted by:** | | |
|---|---|---|
| Name: Rita Lazar-Tippe | | |
| Organization: EMSD/AEP | Signature: | Date: |

| **Project Approved by:** | | |
|---|---|---|
| **Dr. Monique Dubé (AEP)** | | **Dr. Kevin Cash (ECCC)** |
| Signature  | | Signature  |
| Date | | Date |