



Permitting & Safety Requirements Checklist

Technology is redefining our standards for safety, efficiency, and productivity. Companies are under more pressure than ever before to maximize uptime, stay compliant with strict regulations, and optimize how labor hours are spent. With so much at stake, here’s an extensive checklist to help you keep track of the many features and capabilities you and you team require to work effectively.

Yes	No	Permit Request Requirements
		System should integrate with the business ERP, EAM, or CMMS to allow automatic creation of permit requests
		Application provides a simple and intuitive interface that requires little to no training
		Users can create permit requests and enter high-level information that can be checked and expanded post submission
		Users can find and select equipment from an easy-to-use hierarchy and search function
		Users can easily plot work party locations on maps that also allow for vertical positioning
		Requesters can pick from pre-made or customer defined work categories that automatically identify hazards and the necessary controls
		Users can perform an initial risk assessment and pre-identify the likelihood and consequence of work based on an organization’s own risk matrix

		The system can use the work types selected to drive certificate and other permit requirements (confined space, hot work, etc.)
		The system allows for configurable soft and hard controls (user warnings vs. mandatory fields) in all screens
		Configurable approvals at any stage in a workflow, based on information entered (extra approvals for high risk work, etc.)
		Ability to add documents/drawings/photos

Yes	No	Permit to Work Requirements
		Inherits all relevant information from a permit request or template
		Workflows mirror business process and do not add unnecessary steps
		Ability to preview the resulting permit at any stage
		System must provide visibility into conflicts with work based on scheduled date, type of work, and location
		System should allow multiple users to authenticate to do multiple approvals for complex/high-risk work
		Ability to copy a permit for re-use
		Ability to copy the permit to a template for repetitive jobs
		Ability to link permit to certificates (confined space, isolations, ground penetration, etc.)
		Built in auditing functions for robust reporting and compliance requirements
		Configurable fields that allow for simple and complex permit forms
		Comprehensive log of actions performed on permits allowing for a complete look at the history of a job
		Configurable and dynamic print outs that align with existing business paper permits
		Live synchronization of data with the organization's ERP, EAM, or CMMS

Yes	No	Isolation Requirements
		Robust isolation and lockbox management that can accommodate any existing business process
		Build complex isolation steps and procedures, including the isolation type, isolated and restored condition, method of proving, etc.
		Ability to easily navigate the asset structure to find isolation points and filter out maintainable items
		Weather and wear resistant, tailored isolation tags that match existing designs and are easily printed mass printed
		Intelligent isolation tag matching and verification system that ensures tags are correctly installed and verified
		Configurable workflows preventing attached permits from being used until isolations are complete and verified
		Ability to perform isolations on a mobile device from the field
		Isolation certificates can be leveraged by multiple permits and certificates

Yes	No	Confined Space Requirements
		Inherits relevant information from linked permits
		Robust atmosphere record monitoring system that allows configurable gas testing to be performed both before and after certificate issue
		Planning allows for all aspects of confined space management, including entry and exit points, ventilation requirements, etc.
		Online, mobile, and/or paper-based entry and exit logs
		Configurable pre- and post-entry workflow to allow the business to enforce initial inspection and clearing processes
		Allows for multiple confined space certificates to be linked to manage large spaces with multiple areas

Yes	No	Other Certificates Requirements
		Pre-built certificates for managing diving activities, excavation, safety systems and more
		Configurable forms that allow for any manner of business or legislative specific requirements to be met

Yes	No	Mobility Requirements
		Robust mobile application that allows for complete end-to-end creation, planning, approval, issuing, and completion of permits and certificates
		Mobile application is platform agnostic and will conform to any modern device such as iPhones, iPads, Android tablets, and touch screen kiosks
		Simple and intuitive interface designed for a zero-training rollout to permanent users and contractors
		Mobile solution can communicate with ERP, EAM, or CMMS systems to provide full end-to-end functionality, including maintenance activities and planning
		Ability to take photos and add attachments in the field
		Full online and offline functionality

Yes	No	Management and Reporting Requirements
		Simple administration tools that allow the business to completely self manage the system
		Ability to manage users, qualifications, fields, risk assessment requirements, and more either centrally or at a site level
		Easy management of approvals, asset register, and more
		Intuitive field management and screen layout configuration

		Complete self-triggered and/or automated auditing tools
		Easy to build, single click reports for all possible searches, deployable to users to sites
		Confined space register
		Valve overrides register
		Configurable login and warning/emergency messaging

Yes	No	Integration Requirements
		Real-time, two-way integration with multiple ERP systems including SAP, Maximo, Ellipse, Oracle, and more
		Allows for ERP, EAM, and CMMS systems to pass through permit requests and planning data
		Supports data pushes to ERP, EAM, or CMMS system, such as date changes, status updates, and more
		Integrates with any document management system
		Integrates with site access systems to allow “badging in” for authentication, permit issuing, or simply user recognition
		Can warn users trying to leave site when they are still signed on to permits, isolations, etc.
		Integrates with HR and training systems to synchronize personnel information and qualifications/certifications

Yes	No	Implementation and Support Requirements
		Rapid delivery times tailored to business requirements and existing processes
		Both on premise and cloud offerings supported
		SaaS offering is available
		Compatible with business existing mobile device management solutions
		Global 24/7 support

The advantages of a scalable, integrated platform drastically outweigh standalone solutions. Today, company leadership understands that permitting is one critical piece of a much larger asset and work management strategy. As such, integration is vital to optimize transparency and communication between maintenance and operations teams, decreasing lost time incidents and increasing wrench time.

Prometheus Permitting & Safety seamlessly connects with your existing ERP, CMMS, or EAM system to deliver digital transformation for your control of work systems, including permitting and isolations. Integration with other modules of the Prometheus Platform extends the value of the solution, further empowering planning, scheduling, mobility, and other elements of the asset management process.

To learn more about features and functionality, visit our website and review our Permitting & Safety section.

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About Prometheus Group

Prometheus Group is a leading global provider of comprehensive and intuitive enterprise asset management software solutions that work within ERP systems and span the full work management life cycle for both maintenance and operations. Developed jointly with end users, Prometheus software enhances the customer experience for planning, scheduling, and executing work for both routine maintenance and shutdowns and turnarounds, all while protecting the workforce with safety solutions and electronic permit to work. Our straight forward functionality, graphical visualization, and simple processes enable customers to increase productivity, reduce costs, and improve reporting. For more information, please visit www.prometheusgroup.com.