

# Permitting and Isolations 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.

## Permit Request Requirements

- System should integrate with the business ERP 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 a businesses 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

## 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 in order 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 aligns with existing business paper permits
- Live synchronization of data with the business ERP

### Isolations 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 in mass
- 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

### Confined Space Requirements

- Inherits relevant information from linked permits
- Robust atmosphere record monitoring system that allows configurable gas testing to be performed pre and post certificate issue
- Planning allows for all aspects of confined space management, including entry & exit points, ventilation requirements, etc.
- Online, mobile, and/or paper based entry & 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

### 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

### 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 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

### 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

### Integration Requirements

- Real time, two way integration with multiple ERP systems including SAP, Maximo, Ellipse, Oracle and more
- Allows for ERP systems to pass through permit requests and planning data
- Supports data pushes to an ERP 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/Training systems to synchronize personnel information and qualifications/certifications

### 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 MDM (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.

#### 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](http://www.prometheusgroup.com).