

**opentext™**

eBOOK

# The four steps to operational excellence

OpenText Asset Management solutions



## Content

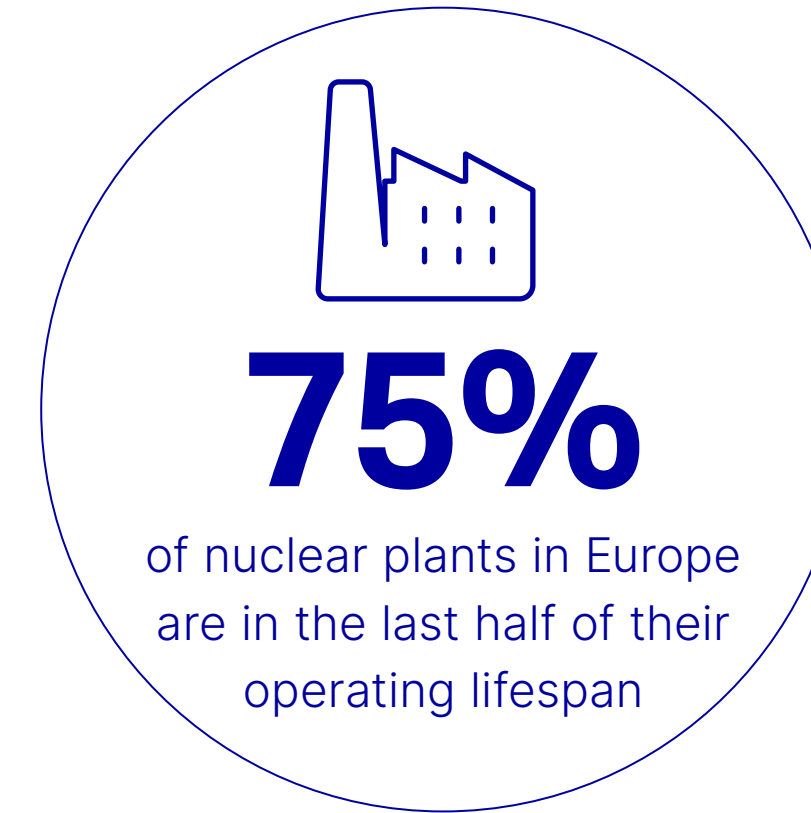
The challenges of operating and maintaining energy facilities	3	Step 2 – Ensure optimal access to content	13
Issues and answers	6	Tools for improving access	14
OpenText Asset Management solutions	8	Step 3 – Manage change with a structured approach	16
Asset Management solutions allow you to...	9	Best practices, captured and automated	17
Step 1 – Get content under control	10	Step 4 – Coordinate information with business processes	19
The first step is to collect and manage all of the relevant documents	10	Uniting diverse systems in an all-encompassing information structure	20
Using the Enterprise Content Management features	11	Prepared for change	22
To address the myriad of different types of information, OpenText Asset Management solutions accommodate all file types	12		

## The challenges of operating and maintaining energy facilities

Your plant has served you well for many years. But you may find operating and maintaining it is becoming increasingly challenging. The assets are aging and regulations are becoming more demanding. Yet pressure continues to increase production and reduce downtime.

The key to effective management is having the right information at your disposal. It does little good to have an “as-designed” document in your hands when there is a more accurate “as-built” document that you cannot locate. When information is missing, mistakes are made. You might drill in the wrong spot and find hidden pipes or face an unscheduled shutdown because you could not plan properly.

**A clear process helps manage change, make operations more efficient and pinpoint the causes of any difficulties.**



**You are not alone.**

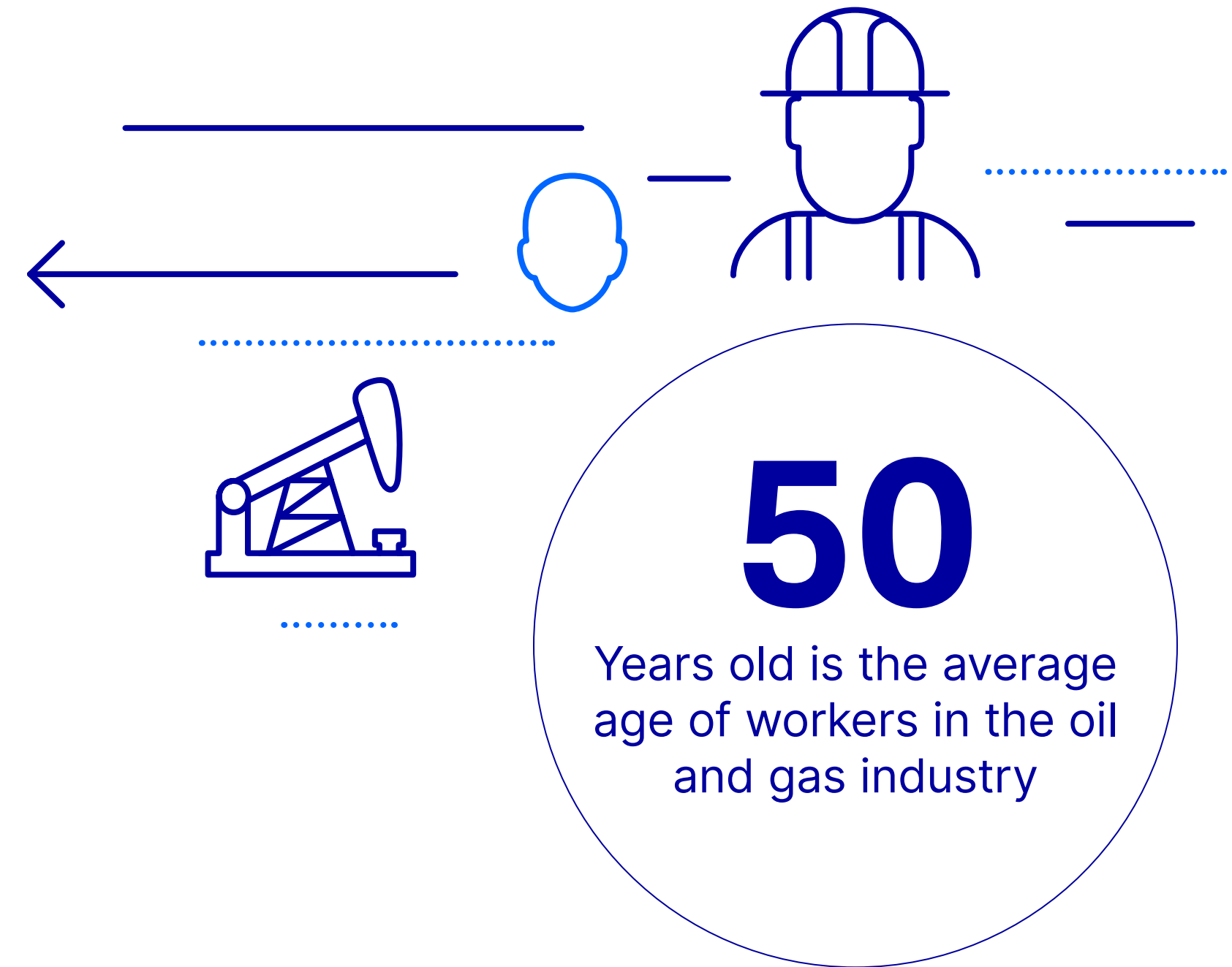
Plant managers throughout the world face similar difficulties.



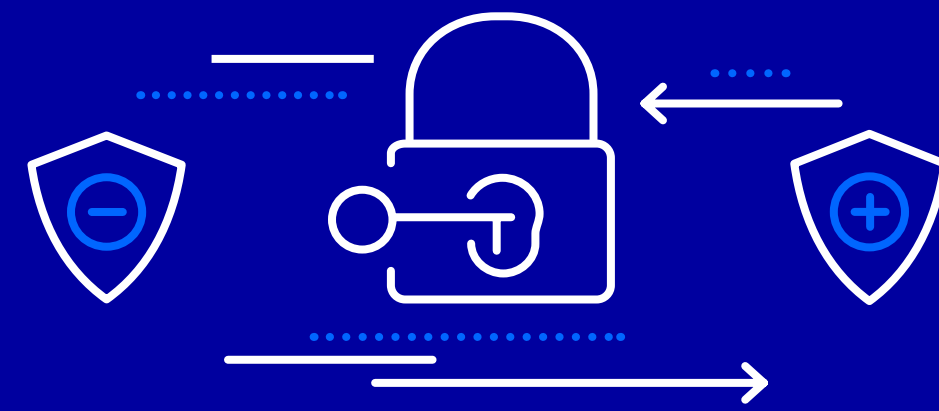
Many plant managers have relied on a core group of people who have been with their organizations for decades.

These people have the “tribal knowledge” that has come in handy when no one else knows the answer. As managers reach retirement age, they take much of the historical knowledge with them. Some organizations strive to retain those employees. Not only is that costly, it is often unreliable and fails to solve the underlying problem.

With the potential to lose important institutional knowledge, plants become vulnerable to attack—especially in an age of heightened security threats. You have to capture the key information in document form, while being careful about how that information is shared.



Too little security exposes you to unknown threats.



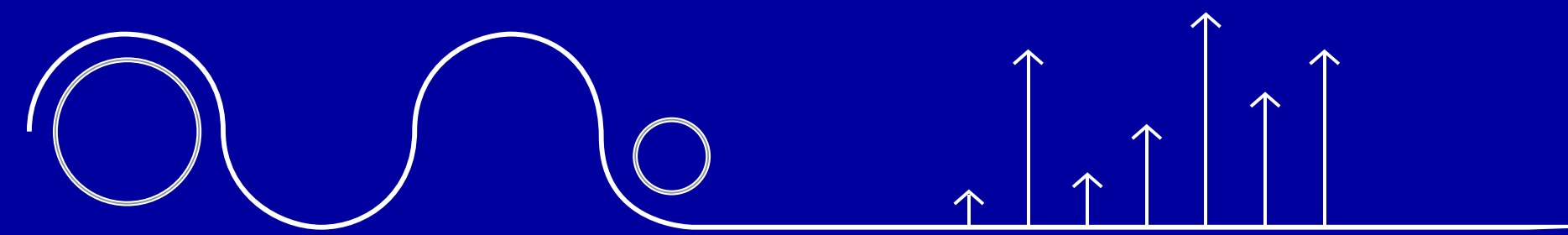
Too much makes it difficult to keep operations moving forward.

And finally, there are regulatory concerns. With agencies of all sorts monitoring activities, organizations need to be able to produce required documents quickly.

But when they are not properly maintained, they can be scattered across the operation or simply lost among the many files—leaving you with no easy access.

Some organizations have resigned themselves to continual fines for failing to meet regulatory concerns.

Such an approach is expensive and can result in lawsuits if accidents occur.



Oil refinery's fine for violating standards  
**\$87M OSHA's largest such penalty**



## Issues and answers

**Managing an energy facility is complex and challenging. At times, it may seem that improving a plant's operations is too daunting to attempt.**

While you cannot create an ultra-efficient system overnight, you can make steady progress and realize benefits each step of the way. OpenText has thoroughly analyzed how our customers have enhanced their maintenance and operations systems.

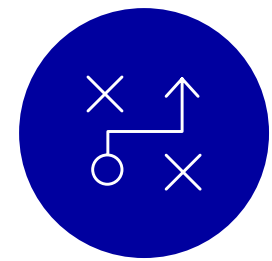
We have looked at industry standards, reviewed analyst recommendations and leveraged the expertise of our services group and partners.

With that knowledge, we have developed a four-stage maturity model to achieve operational excellence.

## The four steps to operational excellence

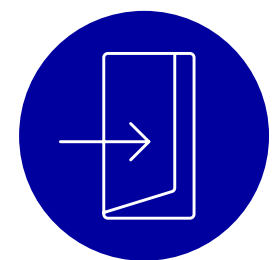


Here is a summary of each of those four steps and how OpenText Asset Management solutions help you move through each



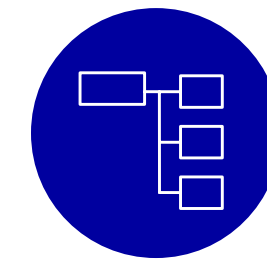
## Step 1 Get content under control

- Use industry-standard taxonomies and document metadata
- Ensure compatibility with all file types, including Adobe® Acrobat®, Microsoft® Office, CAD formats and many others
- Create a unified repository to eliminate information silos
- Incorporate tools and services to migrate from completed projects and legacy systems



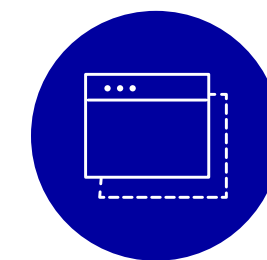
## Step 2 Ensure optimal access to content

- Implement advanced search to quickly find required documents
- Establish security systems for limiting access to those requiring it
- Manage version control to provide visibility of effective versions
- Employ a wide array of mobile access options



## Step 3 Manage change with a structured approach

- Establish built-in processes for reviews and approvals
- Create easily tracked audit trails
- Provide support for transmittals
- Automate distribution and notification of information changes



## Step 4 Coordinate information from other business applications

- Integrate with existing operations, maintenance systems and common business systems
- Ensure compatibility with standard authoring and collaboration tools, including CAD
- Leverage expertise in developing Energy-sector industry solutions

## OpenText Asset Management solutions

The Energy information experts at OpenText have thoroughly considered these issues, drawing on their experience of helping customers address the challenges of these industries. From this base of understanding, they have developed solutions that address the critical factors essential to smooth and efficient management and operations.





## Asset Management solutions allow you to...

### Manage all documents

no matter their format, so those who need to access them can do so when and where they like.

### Automate and streamline change management

as part of uniform processes based on industry best practices.

### Boost productivity and optimize processes

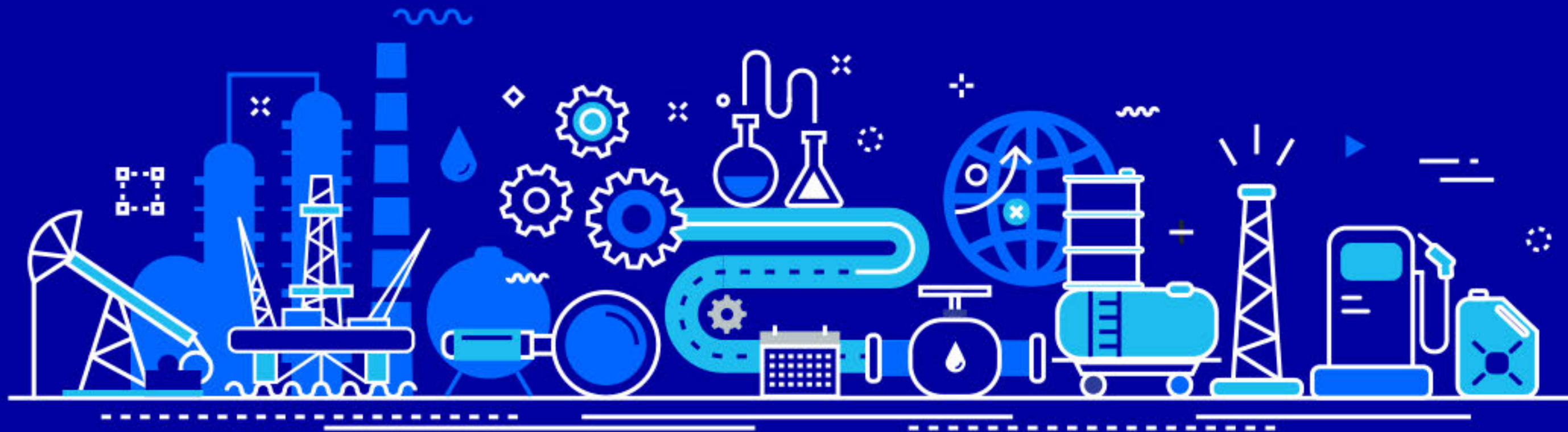
by integrating managed content with operations, maintenance, GIS and other business systems.

### Comply with health, safety, security and environmental requirements

and other regulations by making it easy to respond to compliance inquiries and conduct internal audits and incident reviews.

### Avoid unplanned downtimes, cost overruns or catastrophic events

by ensuring key participants have access to current standard operating procedures and specifications.



## Step 1 – Get content under control

### The first step is to collect and manage all of the relevant documents

Any improvement begins with collecting all of the content that is critical to maintaining and operating a plant.

Many plants were built decades ago. When they were constructed, information was captured on paper and stored in filing cabinets. Even if some of these documents were captured electronically, they were likely stored in a variety of locations.

As the years have gone by, keeping those documents in separate places has led to operational silos.

Training manuals might be in one area, engineering diagrams in another and standard operating procedures in a third. That makes it tough to coordinate any plant-wide efforts, resulting in inefficiency at best.

This includes standard operating procedures (SOPs), technical documents, as-built specifications and drawings, project plans, spreadsheets, contracts, training documents and video and audio recordings. As you move these documents into a unified system, you want to be certain they are set up properly for the next stage of the process: managing access to content. Therefore, develop a system that conforms to standards and ensures effective Enterprise Content Management capacities.



## Using the Enterprise Content Management features

OpenText Asset Management solutions eliminate the information silos that exist within many organizations with an enterprise-wide system that can support thousands of users and millions of documents.

More importantly, they leverage years of OpenText experience and industry best practices and are built to support industry standards. By using solutions that support current and emerging standards, such as PAS55 and ISO55000, ensure that content can be managed effectively to meet the requirements of the operating and regulatory environment.

**Asset Management solutions provide line of sight between:**

Strategic objectives

Management goals

Standardized policies

Technical standards

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 [Watch the video](#)

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## To address the myriad of different types of information, OpenText Asset Management solutions accommodate all file types

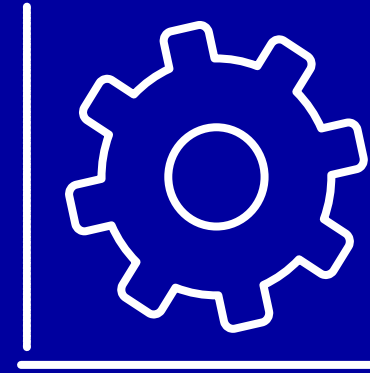
### Allow users to quickly find what they need.

While it sounds straightforward, this first step is often very difficult. It requires scanning boxes and filing cabinets full of records, as well as consolidating departmental and legacy repositories. To assist, OpenText has service experts with years of experience implementing systems and migrating content.

OpenText also provides industry-leading document capture and transformation technologies. These technologies can automate the migration or handover processes, improving reliability, accelerating the implementation process and mitigating the risk of moving content into a new system.



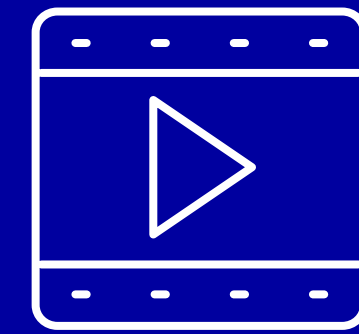
Office documents



Engineering drawings



Audio



Video

## Step 2 – Ensure optimal access to content

Once you have the content under control, determine how it is distributed and accessed. Even in a well-managed system, finding content can be a challenge. Typically, plants have huge volumes of documents and different standards for organizing them. But the need to quickly gather the appropriate documents can be critical in cases such as preparing incident reports. Rich search capabilities are required to allow users to rapidly find engineering content based on the part or tag number, document type or effective version.

Part of the task in this stage is to determine rules and processes for document access. You may need to share documents with outside contractors or others who have a need to see the content but no right to alter it.

You will want other documents automatically sent to critical parties to ensure proper signoffs and that information gets to those who need it as part of a task or project.

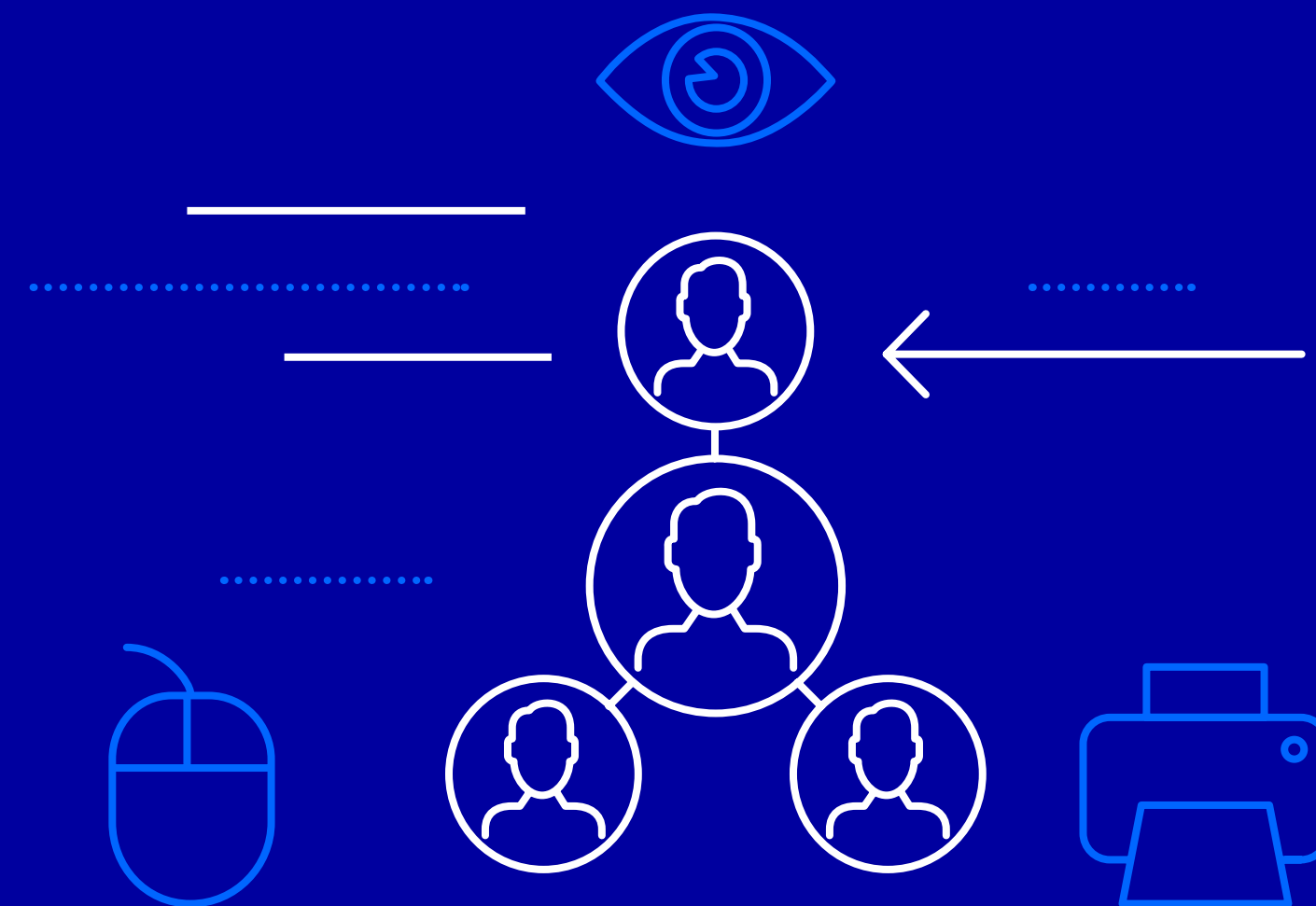
Due to security concerns, you cannot simply make the information available to everyone.

On the other hand, you do not want your information so locked down that those who need it are prevented from seeing it in a timely fashion.

## Tools for improving access

OpenText Asset Management solutions provide easy-to-use controls to tailor access for each document, depending on the project facility and discipline and the role each individual plays in it. And you do not need to reconfigure each document for access, you can automate it based on document type or organization.

You can govern what each user can do with a document.



Documents that you do not want altered can be distributed in formats that prohibit editing, such as locked-down PDFs.

Just as importantly, the solutions ensure the reader sees the most recent version of a document, with automated features to move the updated version to the front of the line. At the same time, previous versions are maintained as history. Automatically add a watermark that indicates the document's status and date it was viewed. All of these features apply to mobile versions as well.

The solutions also let you “push” documents to those who need to see them. For example, to provide an update of an SOP before or during a repair. This helps guarantee that critical information gets to where it needs to go—without depending on others to request it.

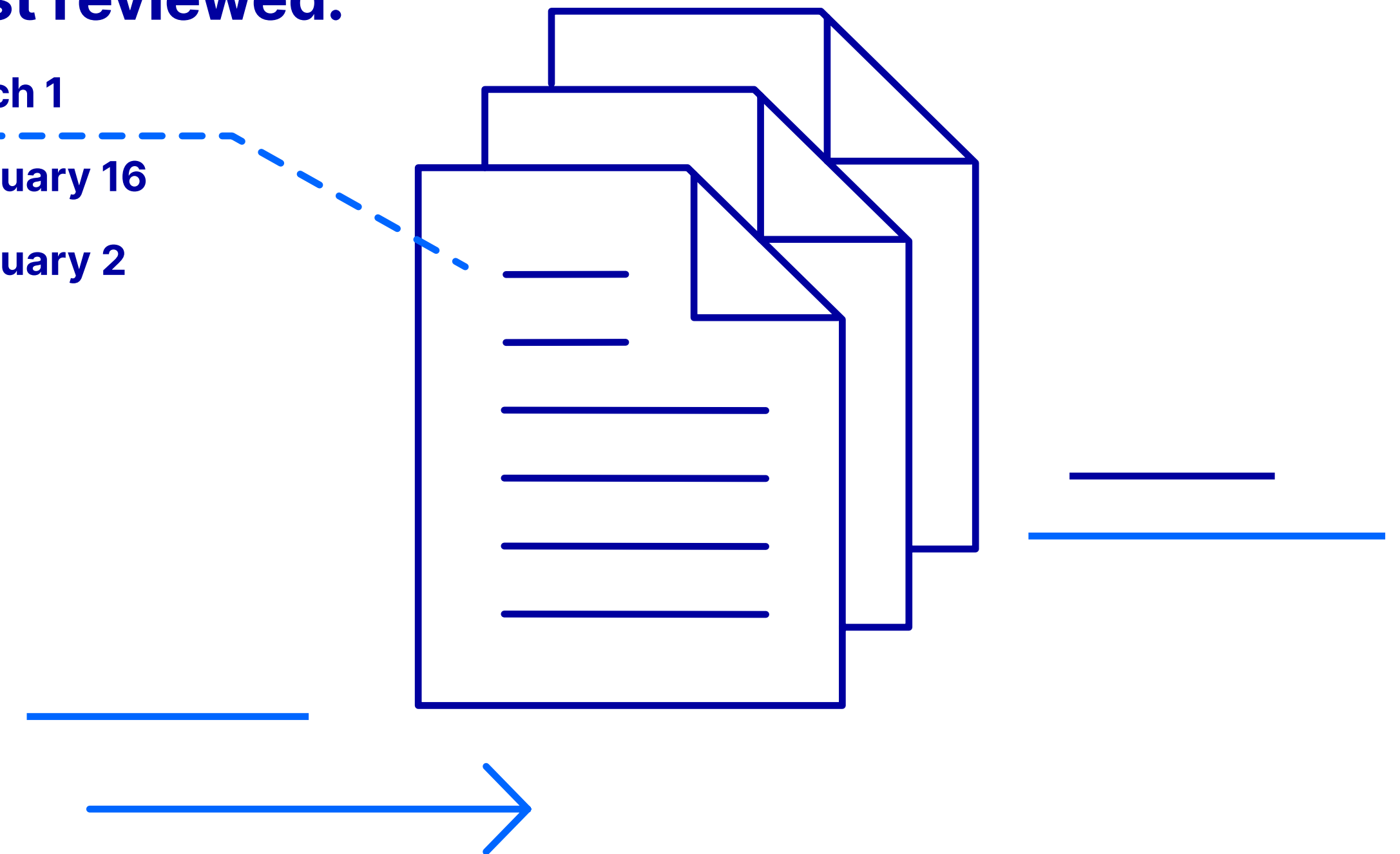
Finally, because operations are increasingly conducted at remote sites, the solutions allow field workers to quickly access information from mobile devices.

## Last reviewed:

March 1

February 16

February 2



The current revision moves to the front of the line.

## **Step 3 – Manage change with a structured approach**

Responding to new demands—whether from internal or external sources—is a constant focus of operations and maintenance managers. Failing to respond to those demands is not an option. At the same time, managers need assurance that change programs will be effective across their organizations.

There are many reasons to initiate change, including failing parts, more efficient systems or improving SOPs to increase safety. Yet all changes require a consistent process. It is paramount that pending changes are approved by all necessary stakeholders, fully documented to meet compliance concerns and

thoroughly communicated to all who need to be informed. Often these programs involve assistance from outside vendors who need adequate communication and expect timely transmittals. With the emergence of quality asset information management standards, such as PAS55 and ISO-55000, those in charge of change management know they will be expected to meet these norms before they can consider their operations successful.

In short, managers need all the help they can get, not only from colleagues, but from information systems.

**Miscommunication, poor decisions and delayed responses are continual threats to successfully implementing operational changes.**



## Best practices, captured and automated

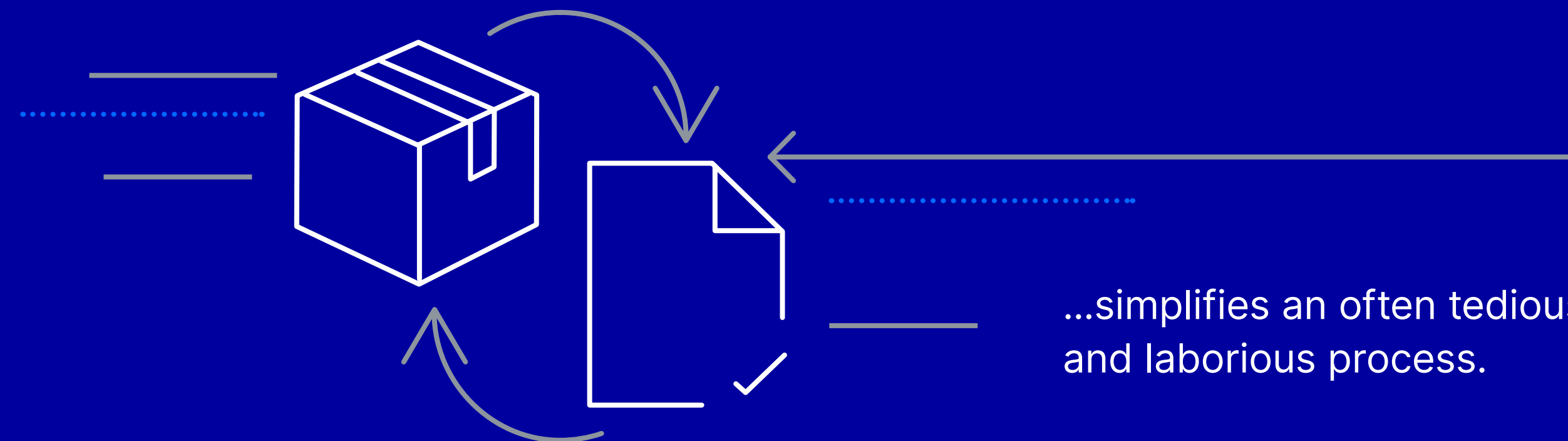
The solutions use industry best practices created by experts working with customers for many years. They are based on the principles described in PAS55, ISO 55000, ISO 9001 and other standards for confidence that information is being managed effectively.

Furthermore, the solutions follow a structured process for change requests, beginning with submitting an electronic field request and continuing with step-by-step review and approval check-offs. More readily obtain and oversee reviews with this structured approach.

The solutions facilitate collaboration with outside parties by providing design process and transmittal controls to ensure those relationships and payments proceed smoothly.

Automatic packaging of required documents

and pre-determined recipient lists, plus options to share through web access, email or sync-and-share...



OpenText Asset Management solutions allow automated notification and distribution of documents so that parties are brought up to date on all aspects of the change management. They also allow managers to share content across organizational boundaries while maintaining security through controlled access. The solutions have versioning features that guarantee each group sees the documents that are current and effective, minimizing the threat of miscommunication, poor decisions and delayed responses.

Should an error occur or processes not go as smoothly as anticipated, the solutions allow managers to reconstruct where the difficulties occurred, identifying mistakes during design and construction or confirming that the plant was operating and maintaining the asset properly. It adds up to greater overall efficiency, risk reduction and far fewer headaches for managers.

...identifying

1 error located

...identifying

Operational

The solutions allow managers to reconstruct where the difficulties occurred.



## Step 4 – Coordinate information with business processes

While the documents that are involved in running your plant—training manuals, SOPs and the like—are easily managed by OpenText Asset Management solutions, other systems are critical to ensuring your plant runs efficiently every day. One of those critical components is a maintenance management application. Any new solution needs to integrate these familiar tools into day-to-day operations.

These existing elements are part of the system employees have come to understand. They are comfortable with them. They also represent a significant investment in time and resources.

You also likely want to consider the use of mobile technology. With mobile platforms and devices increasingly becoming part of daily functions, you want to be certain that document control extends to this technology. Printing out paper documents and not having the most recent version is now a thing of the past.

Today's organizations rely on using mobile devices to gather and report information from the field, such as notes and photos.

**But mobility is no longer just a passive reception of information.**

## Uniting diverse systems in an all-encompassing information structure

OpenText has always understood that enterprise content should be integrated with key business systems. From the beginning, OpenText Asset Management solutions were designed to “play well with others.” The software designers fully anticipated that plant employees and managers would want to retain those systems that are working well for them.

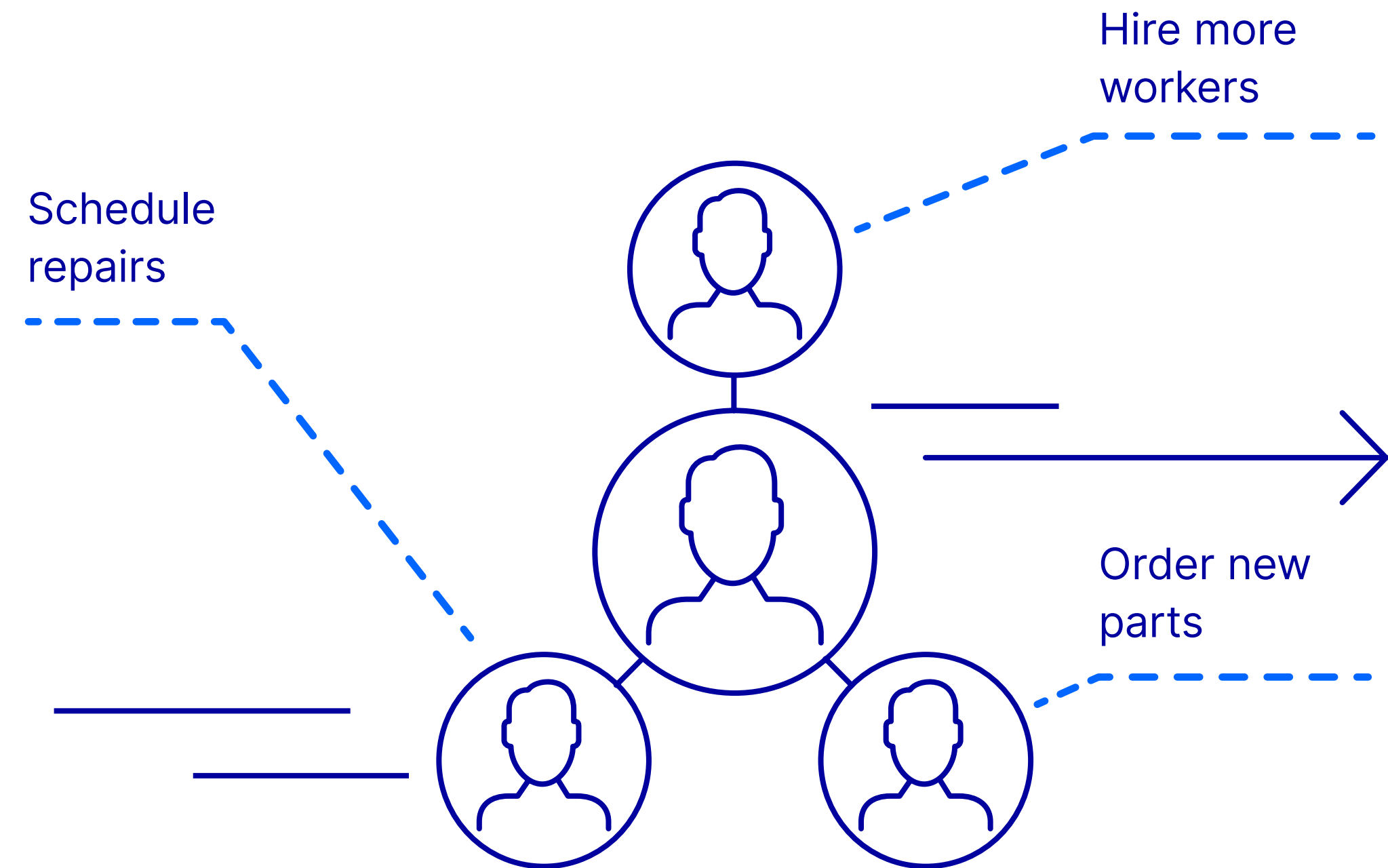
So the solutions, based on the OpenText™ Extended ECM platform, can readily integrate with existing information portals, such as Microsoft® SharePoint® and with standard, well-established software, such as Microsoft Office, Adobe Acrobat and industry-leading CAD systems. By allowing users to continue using systems they are comfortable with, avoid any retraining costs or other investments that would be associated with different applications.

Beyond those baseline applications, the OpenText Asset Management solutions work with industry-leading maintenance and operations management solutions, such as SAP® Plant Maintenance. All documentation related to plant maintenance or operations, such as P&ID's, maintenance instructions and SOPs are stored and managed in OpenText™ Content Server but accessed directly through the operations and maintenance system. This means the engineer can continue to work in the business system of choice but ensures they have the correct documentation to complete the task.



Because OpenText Asset Management solutions were built on a deep understanding of the Energy sector, they anticipate the ways in which plant managers would rely on their features. That means you are able to move through all four stages of improving plant efficiency as quickly as you are able.

But you do not need to go it alone as you make these transitions. Our service teams and certified partners have years of experience in the industry, working with the systems commonly employed by operations worldwide. They can help manage your progression through all the stages of development to unleash your plant's potential—to make it run smoother, and more reliably.



OpenText solutions anticipate how plant managers would rely on their features.

**Prepared for change**

The challenges of maintaining and operating a plant are likely to endure. There is no escaping the fact that plants are aging, as are the workers who have kept things running well for years. Demands for efficiency and regulatory compliance will continue as well.

Thankfully, there are solutions for managing the documents that are so critical to efficient maintenance and operations management.

# OpenText Asset Management solutions are an asset all their own, helping:



**Manage**

all documents.

**Streamline**

change management.

**Boost**

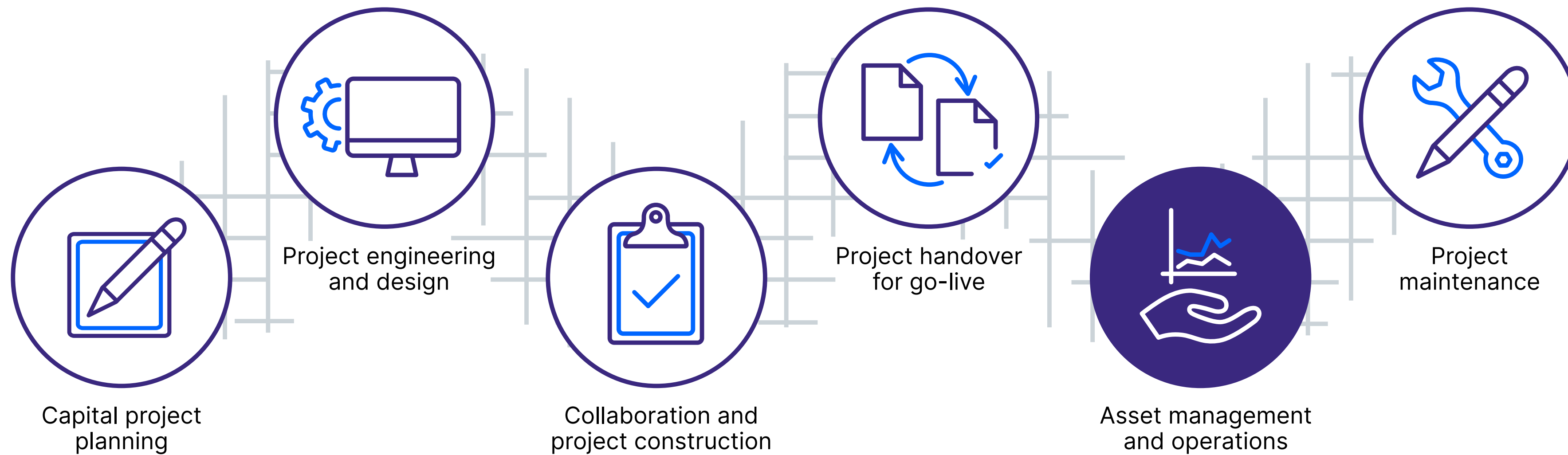
productivity and optimize processes.

**Comply**

with health, safety, security and environmental requirements.

**Avoid**

unplanned downtimes, cost overruns or catastrophic events.



## About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit [opentext.com](https://www.opentext.com).

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