

# Isolate™

## EQUIPMENT ISOLATION MANAGEMENT AND WORK PERMIT TRACKING FOR INDUSTRY



### The Challenge

A safe, auditable framework for performing plant maintenance and engineering changes is essential for all process plants.

Plant complexity, staff turnover, external sourcing of labour during peak periods, and informal management processes all increase the risk of injury, equipment damage, and extended downtime.

Isolate, the Equipment Isolation Management and Work Permit Tracking system from TEAM Technology, provides a secure, robust, flexible, and cost effective solution to the challenge.

Isolate helps plant managers to

- Minimise plant downtime through efficient management of plant isolations
- Improve safety through the provision of clear, audited isolation instructions
- Improve the quality & repeatability of work by encouraging continuous improvement of isolation activities
- Improve communication between production and maintenance personnel through using a common framework to plant component handover.



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### Solution Summary

Isolate focuses on the management of the instructions for isolating a piece of plant (the Isolation List), and the control of the process of executing this work (the Permit).

There are 4 categories of Isolate users: Isolation List Maintainers, Permit Issuers, Permit Acceptors, and Reporting Users.

**Isolation List Maintainers** – Creation and maintenance of Isolation process documentation is usually restricted to a select few who know the plant area very well. An Isolation may require review by another party(s) prior to becoming authorised.

**Permit Issuers** – A Permit is issued based on an Isolation List for the execution of that Isolation. A Master Permit may hold many Permits where multiple Isolations are required for the execution of a job. Permit Issuers monitor the progress of the execution of Permits and are accountable for insuring the Permit Acceptor is fully aware of his/her accountabilities, and has all of the information required to execute the work safely.

**Permit Acceptor** – The Permit Acceptor manages the execution of the work of the Permit, and is responsible for ensuring that the work is performed in strict accordance with the Isolation List and any other procedures or instructions issued with the Permit.

**Reporting Users** – All Isolation Lists and the state of any Permits in the field are freely reviewable via the site's intranet.

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### The Power of the Equipment Register

The Equipment Register is usually at the heart of how plants manage their maintenance strategies, work orders, and plant costing. Isolate will integrate with your equipment register so that Permits can be related to your Work Orders and Equipment Costings. This also provides a consistent frame of reference for the execution of work.

### Procedures and P&IDs

There may be other supporting documentation outside the Isolation that is required for the safe completion of the work. References can be made to these documents on an Isolation, and where the reference can be made as a URL (i.e. web address), the related document can be called & viewed online.

### Security

- Only Isolation List Maintainers are able to make changes to an Isolation. A change to an "Authorised" isolation immediately triggers a requirement for reauthorisation. An Isolation Maintainer may issue Permits.
- Permit Issuers cannot edit an Isolation, but can issue Permits based on Isolations.
- Permit Acceptors do not use the system directly, but are named as parties to the Permit.
- Reporting Users may review (read-only) any Isolation or Permit.

Isolate also allows the plant to be segregated into different areas of responsibility, so that those who can maintain isolation lists or issue permits in one area may not be authorised to do this in another.

### Auditability

All transactions are stamped with a timestamp and the username of the person lodging the transaction.

### Integration

Isolate can be configured to operate as an integrated solution or stand-alone.

In its integrated configuration, the plant equipment register and personnel information is sourced from your ERP, EAM, or CMMS system (eg SAP, MIMS/Ellipse, J. D. Edwards, Maximo, Pronto, etc), and any updates to the base information are automatically promulgated through to Isolate.

The benefits of such integration includes:

- Effective adoption of the system with operational personnel using information they are already familiar with
- Common language for maintenance and process personnel
- Integrated reporting spanning systems – e.g. costing the execution of permit through picking up all labour, material, work order, or other costs booked to that equipment item while the permit is active.

Alternatively, this information can be entered and maintained within Isolate itself in a secure fashion.

### Technical Architecture

The system has been built with industry standard tools from Microsoft and Oracle, and can be deployed as a client/server application, or "thin" using Citrix Meta-Frame or Windows Terminal Server.

All reporting is deployed real time on demand via the web.



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