



CHECKLIST

Five steps to ensuring a safe, productive, and compliant workplace

ENTERPRISE ASSET MANAGEMENT

Production facilities across industries are raising the bar of what it means to operate in a safe and healthy environment. Systemized and digitized asset management is replacing manual, error-prone processes to ensure efficiencies, uncompromised clean standards, and regulatory compliance.

Here are five steps toward creating a modern maintenance plan that goes beyond official guidance and sets the stage for a successful future and whatever it brings.

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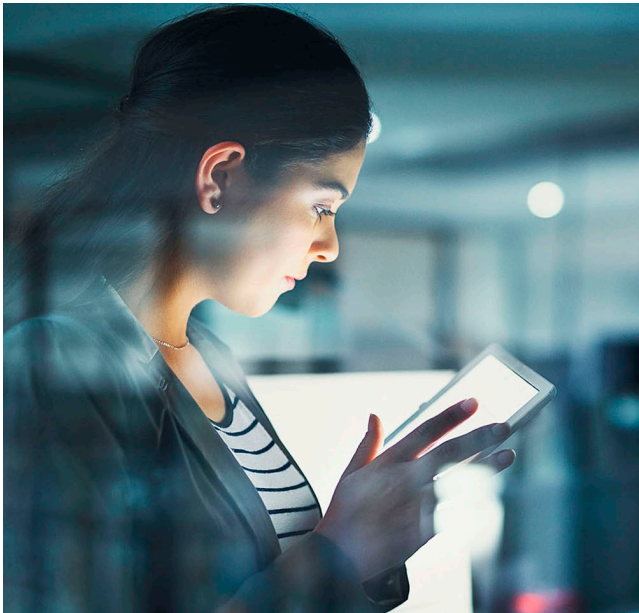
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Move from preventive to prescriptive

Step 1: Ensure clean practices by staff

It is too easy to introduce a foreign contaminant into a production facility, compromising the entire operation and future business viability. Clean protocol adherence starts with staff, and 100 percent compliance depends on:

- ❑ Automated maintenance checklists and workflows
- ❑ Real-time maintenance tracking and reporting
- ❑ Digitized work and training schedules
- ❑ Manager sign-offs integrated with staff skill sets, training, and qualifications



Understanding the new normal and the questions that will be asked

Field Technicians, Crew Dispatch, Schedulers, Maintenance Planners

How do we implement and operate in the new “safe and clean” paradigm?

Reliability Engineering, Quality Control Engineering, Risk Management & Safety Management

What will be the results, and how will we summarize and present them to ensure elevated safe-and-clean production, while maintaining output quality, reliability, and sustainability?

Departmental Operations Directors, Production Directors

How do we ensure a safe return to the workforce, while creating a business transformation driven by digital insights and data?

Business Operating Officers and Asset Management Leadership

What do we keep to maintain continuity, and what do we change? How do we balance efficiencies, the need for profitability, heightened protocols, and less risk tolerance?

Step 2: Update preventive maintenance schedules

Preventive maintenance (PM) cleaning procedures and requirements continue to evolve. Technicians and operators are now required to wear PPE and clean equipment more frequently. Tracking, monitoring, and oversight of any contamination is expected, and facilities can expect intense scrutiny of any incidents.

“ **The American Society of Heating, Refrigerating and Air Conditioning Engineers (ASHRAE) have issued new guidelines around flushing heating and cooling systems, dictating more routine review of preventive maintenance practices.**

Step 3: Identify assets at risk

Prioritizing key assets helps focus strategy and resources on the equipment and systems critical for ongoing operations. To prioritize, organizations should do a situational evaluation of the primary physical equipment that supports safety and productivity. Staff should then convene around:

- A Risk Assessment Index (RAI) assigning scores to assets
- Decision trees and formulaic approaches to calculate the RAI score
- Assigning score ranges to help set priorities

Step 4: Be ready for changing expectations

OSHA, EPA, and DHEC are familiar oversight and guidance organizations across industries. Reputable and successful operations have always exceeded those guidelines and regulations, which are expected to change. Real-time maintenance reporting should be available, at all times, and include:

- The procedures in place
- Implementation timelines and adherence reports
- Staff training and certification documentation
- Hazardous materials and activities, and mitigation/avoidance plans

Step 5: Move from predictive to preventive

While a formal, preventive maintenance system is the first step toward a safer, cleaner, and healthier production environment, organizations should begin the shift to a culture of predictive and prescribed practices. These practices rely on:

- Complete asset maintenance and management data—from supply chain to environmental controls—integrated across facilities
- The ability to apply smart technologies and key analytics to historical data such as failures, repairs, warranties, and OEM expectations and strategies

For a broader look at rebuilding a safe and compliant workspace, read the best practices guide: “Rebuild a safe and compliant workspace.”

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