



MAXIMIZE YOUR ENTERPRISE ASSET MANAGEMENT SYSTEM WITH THE MERIDIAN EDMS INTEGRATION

**Enhance access to engineering documentation for your
maintenance and operations teams.**

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ABOUT THIS EBOOK

When organizations combine Accruent's engineering document management solution, Meridian, with enterprise asset management (EAM) systems like [Maintenance Connection](#), Maximo, SAP PM, Infor and others, they can increase visibility into their approved engineering documentation and ensure fast access to all asset information. This improves productivity for your maintenance team and helps them avoid costly mistakes.

Typically, EAM solutions help organizations manage their assets from planning, procurement and deployment all the way through tracking, maintenance and optimization. However, EAM solutions involve multiple users across an enterprise and can result in a number of challenges, including:

- A loss in workforce productivity by not providing a secure way to easily access the right engineering documentation.
- Multiple, outdated versions of documents stored in different places.
- Wrong spare parts in stock due to incorrect documentation.
- Accidents due to improper maintenance procedures or incorrect revision of engineering documents.

Oftentimes these documents are not immediately available for the maintenance team. Additionally, it can be challenging for maintenance teams to route their feedback, comments, pictures and notes back to the engineering teams.

This eBook is intended to provide guidance on integrating Accruent's engineering document management system, Meridian, with EAM solutions to maximize their combined strength and ensure faster, more accurate access to dynamic asset information throughout the asset lifecycle.

This integration will help organizations break down information silos between disparate departments and ensure quick access to technical documentation for maintenance teams whenever and wherever they need it.

By providing a single source of information for all engineering documentation, teams can have direct access to all related technical documentation at the click of a button within their EAM solution, and ultimately, eliminate the duplication of data within their different systems.

"The assets and documents in both applications are 100% identical. As a result, our people have a better view of the as-built environment and, therefore, work more efficiently. Consequently, management costs have been reduced."

– René Baron, Maintenance & Engineering, BASF

MANAGING THE COMPLEXITY OF YOUR ASSET-DOCUMENT RELATIONS

A key business challenge is the silo-based set-up of engineering and maintenance teams. Although these teams rely on each other for information, they typically use separate systems.

These disparate departments are also typically not set up to share information in an easy or reliable way. This can lead to multiple inputs of similar information and result in extensive search times or delays in reviews and approvals.

For example, when maintenance goes to perform work on an asset, there are numerous types of documents and specification sheets needed, and they are typically located in different systems. There are piping and electrical diagrams that engineering might own, spec sheets that need to come from outside vendors, and reports and pictures that reside with maintenance.

With all of this information being stored in different places, it lacks any real connection to specific assets. **Accruent's Meridian is able to store all engineering and maintenance data in a single system, providing a single source of information to connect documents to assets.** This allows maintenance teams to easily find their technical documentation at a click of a button when performing their work orders.

With most enterprise asset management solutions, teams struggle to overcome data silos between disparate departments because their systems rely too heavily on individuals manually keeping each system up-to-date.

Instead of uploading or linking documents manually against each asset in an EAM solution, which is standard procedure for many organizations, integrating with Meridian reduces the effort needed to properly manage the relationships between asset tags and engineering documentation.

By automating this process, you can be sure that your operations and maintenance teams are always working with up-to-date technical asset information.





SIMPLIFIED ASSET TAGGING WITH MERIDIAN

Assets — such as pumps, valves, vessels, process lines, etc. — are represented on documents and drawings such as procedures and P&IDs. To ensure that all documents are shown when searching by asset tag number, the tag-doc relation is established.

This process is simplified by Meridian through tag extraction. The document is scanned for all tag numbers and checked against existing tag numbers from the EAM to confirm the reference exists.

Tag extraction can be completed as a background process or by the user. The user interface helps to easily manage all tag-doc relations during plant modification projects.

HOW DOES THE INTEGRATION WORK?

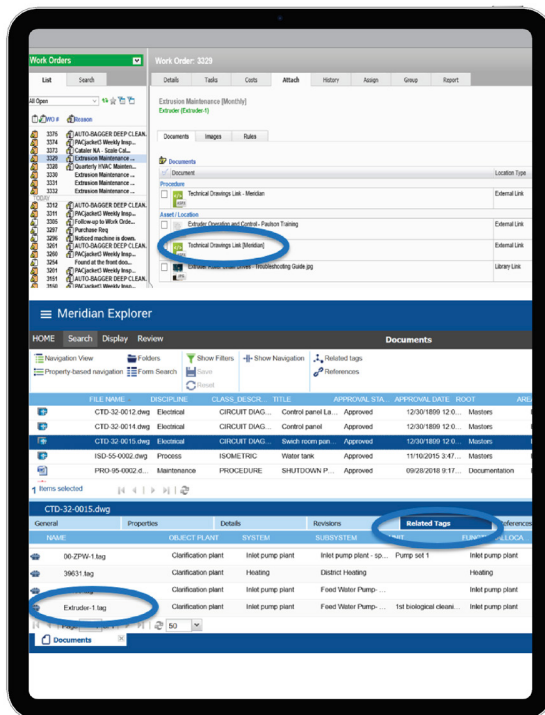
The seamless integration between Accruent’s Meridian and an enterprise asset management (EAM) system works to create a synergistic environment where users can maximize the combined strength of both products.

With the integration, a maintenance team member inside of a work order within their EAM system will notice a **button called “Meridian Documents.” By clicking this button, the user can view all related documents – such as electrical diagram, drawings, inspection reports, etc. – for any particular asset in the work order.** The user can also make comments and add redlines to various documentation to indicate what needs to be changed and route that information automatically over to engineering to initiate a change project. They can even attach a photo of the situation in the field.

This all ensures quick access for on-site maintenance teams when they arrive at the actual piece of equipment that needs repair. These teams can then easily reference all related documentation anytime, anywhere. This integration also helps with organizational compliance and ensures that facilities are fully documented with fast access to all required content. **Organizations need to be able to get the right documents to the right people at the most optimal time, and this integration helps organizations utilize their global mobile workforce to make better decisions, improve safety and reduce costs.**

An EAM user can also make remarks about documentation and even add redlines to indicate either what has been changed or what needs to be changed. **The redlines and remarks can lead to a “to-do” item for the engineering department within Meridian.** Based on the input of operations and maintenance – and given the budget is approved – engineering can initiate a change project, from small up to very large projects.

During the lifetime of the projects, EAM users work with the latest released “as-built” information. After construction and commissioning, all master data can be made as-built. New assets might be created, tag-doc relationships changed and updated, and hotspots generated before release to master. In this way, the handover process is seamless, and operations and maintenance are assured of as-built master data.



SAP-PM CERTIFIED INTEGRATION

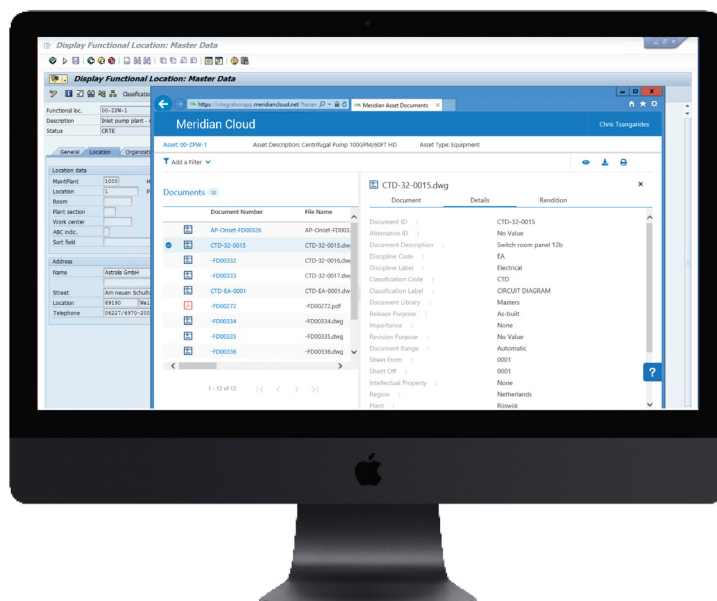
At Accruent, we are constantly striving to improve our engineering document management solution, Meridian, by understanding industry and technology trends and advances. We listened to our customers and heard that they were leveraging the power of enterprise asset management (EAM) systems such as [Maintenance Connection](#), SAP-PM, Maximo, Infor, etc. and knowing that our system was equipped to handle this intelligent data, we began the process of creating a certified integration.

Our integration with SAP-PM is certified by SAP for functionality, performance and automation. This integration is robust and organizations now have inter-linked data from both interfaces — allowing users to access all the relevant information they could ever need. The benefits of the SAP certified integration are:

- Zero interference with other SAP modules
- Up-to-date asset information for operations, maintenance and engineering teams
- Two-way sync to ensure user access the latest and greatest versions of documents
- Quick access to the most current safety and compliance documentation

From the SAP-PM system, users have direct access to the related technical documentation, for example, when viewing a work order, equipment or job plan. If required, the documentation set can be further filtered and additional search criteria can be applied. Of the related technical documentation, the user can see all its details, document status and document content through the in-built viewer. Users can also redline drawings and add comments based on the performed maintenance tasks.

Interdepartmental communications are greatly enhanced as the engineering department is immediately notified of comments and provided with the remarks, all without having to leave the SAP-PM environment.



“Through the time and resources saved in search and retrieval and document processing, we are enjoying a new operational efficiency and very low mitigation costs.”

— Huntsman, Edward van den Boogaard, Group Leader, Document Management

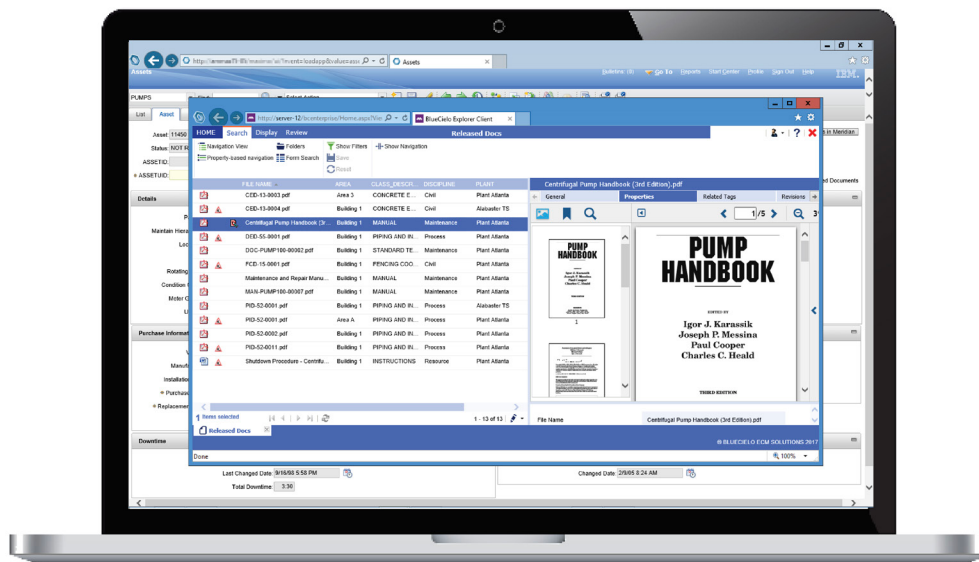
SUMMARY

By integrating Accruent’s Meridian with an EAM system, your organization can substantially enhance access to all essential, asset-related data during any phase of the asset lifecycle. Meridian is a software suite that is designed to enhance interoperability for maximum efficiency. **Unlike departmental point solutions that are usually limited and are not purpose-built from inception, Meridian leverages the current investments in business applications to optimally support the business process.**

As an organization, Accruent realized that our customers were interfacing with other popular applications and we knew that it was crucial for us to construct the architecture of our product in such a way that these users were able to interface between multiple applications in the most efficient manner. **By providing a customized button to the EAM user interface, users can easily access all technical documentation related to the asset at a click of a button, easing the information handover process between engineering, maintenance, and operations.,** and eliminating duplicate data entry into different systems.

MAXIMIZE WRENCH TIME

Organizations can increase their teams’ productivity by saving the amount of time it takes to search high and low for elusive technical documentation. They can ensure that their maintenance teams are utilized in more productive ways and eliminate the need for excessive paper printouts before going on-site. All of their technical documentation can easily be available on their mobile devices — even in remote locations.



REDUCE RISK

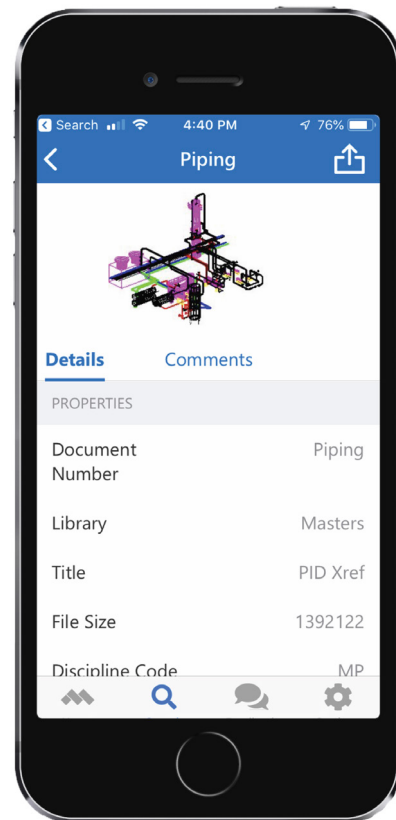
Organizations can mitigate risks by ensuring that all stakeholders have access to the latest approved versions. Maintenance teams can reduce administration errors as well as ensure that the right spare parts are available with up-to-date documentation. Organizations can provide an audit trail and ensure that they are meeting their quality and compliance standards. By ensuring 24/7 access to current engineering documentations, organizations can guarantee personnel safety for team members on-site. Avoid costly downtime because your teams cannot find the information that they need.

MANAGE HANDOVERS

By consolidating systems and ensuring the most current documents can be found easily, organizations can streamline their document handoffs between different departments to raise efficiency and productivity. Engineering, maintenance and operations teams need each other's information and integrating our engineering document management solution, Meridian, with an EAM system can provide a seamless connection between these disparate departments to ensure that they are working off a single source of information.

"With streamlined workflows, improved communication among departments, and easy access to information, Meridian has helped us increase employee efficiency and better focus on our core mission of creating innovative new therapeutic treatments."

– AbbVie, Bill Eager,
Drawing Management Senior Engineer



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