



# Ten j5 Industraform® Templates That Digitize Paper, Spreadsheets and Word Processor Documents

The j5 IndustraForm Templates concept – the ability to transform paper, forms and spreadsheets into enterprise-level applications – allows operations, safety, maintenance, production and IT departments to work on a single enterprise platform. This greatly reduces their reliance on inadequate methods.



For more information on j5 Operations Management Solutions, please visit

[www.hexagonppm.com](http://www.hexagonppm.com)

## 1. Daily Target Management / Board

Daily target management is a key component of efficient operations management in modern industrial plants. When sites rely on spreadsheets and paper to manage this, information is not readily available, there are no workflow or auditing processes, worksheets are easily corrupted, and targets are only visible to a few users. j5 Daily Target Management overcomes these problems by providing an enterprise solution for this vital function. j5 IndustraForm Template functionality helps ensure that personnel follow consistent work procedures around these daily targets as part of the Plan-Do-Check-Act (PDCA) Deming Cycle.

## 2. Batch Management

Personnel need forms that include the ability to track the ordering and setting up of recipes, the real-time monitoring of the batch, the ability to record key parameters and the reporting and archiving of this information. A j5 Batch Management IndustraForm Template provides all these capabilities in a format that is enterprise-wide, flexible and configurable to the specific requirements of the batch, managing the operations in a consistent, auditable set of procedures. Enabling recipe batch planning and management, real-time tracking via a DCS / Data Historian, j5 Shift Handover and high-level batch visibility.

## 3. Work Requests

Notifications of problems to the equipment maintenance group usually originate from the operations department. As a result, these work requests need to be sent from a digital logbook to the maintenance application (CMMS). A j5 IndustraForm Template can appear manually or automatically to allow operations staff to report a maintenance issue, which is then immediately sent to the CMMS. The CMMS then syncs back to the j5 IndustraForm Template with any updates.

## 4. Product Movements

Product movements include the delivery of raw materials, internal transfers between units and the delivery of finished product to pipelines and tankers. A j5 Product Movements IndustraForm Template efficiently tracks product movements from the point of order, to the planning, to the real-time monitoring and reporting, through to the management of the delivery, invoicing and receipt of payment. Personnel workflow can also be managed.

## 5. Ship Unloading / Loading

Ship unloading / loading is a routine activity, which requires step-by-step instructions and checklists. j5 IndustraForm Templates allow for the complete configuration of checklist items and operating procedures, resulting in an efficient and tailored process. With j5 IndustraForm Templates, an enterprise can modify this process easily on its own, using a spreadsheet-like configuration tool.

## 6. Pipeline Management

The management of pipelines requires a set of diverse procedures that must be carried out consistently. These include the recording of line locators, pig management, fault reporting, public event reporting, communications failures and others. A j5 Pipeline Management IndustraForm Template can define the information to be recorded, the procedures that must be carried out, and the key parameters that must be reported. Information can come from and be triggered by the DCS / Data Historian. The j5 IndustraForm Template ensures that events are correctly categorized and available to everyone.

## 7. Plant Upsets / Inhibits / Overrides

It is essential that supervisors know how many overrides, inhibits and ineffective barriers currently exist, and therefore understand if it is still safe to operate the plant. j5 IndustraForm Template workflows ensure that only

persons with sufficient security privileges can enter, update, review and approve inhibit information. j5 IndustraForm Templates also make it possible to integrate data from real-time systems such as the DCS / Data Historian.

## 8. Standard Operating Procedures

To enhance site safety, operators must carry out procedures precisely per the written and accepted standard operating procedures (SOP). Paper-based procedures have limitations in terms of availability, flexibility, reporting and auditing, and they cannot enforce a set sequence. A j5 IndustraForm Template SOP can provide a checklist of steps to be carried out in the field, which can be viewed on a desktop or mobile device. This allows for the recording of every step made by the operator. Real-time and asset information can be linked in to the SOP, providing improved situational awareness.

## 9. Risk Analysis

Risk analysis / assessment is an essential part of hazardous day-to-day operations. It is common that Job Safety Analysis (JSA), Task Risk Assessment (TRA), Operational Risk Assessment (ORA) and Operational Risk Management (ORM) forms are not created and reviewed on the same platform, leading to inefficiencies such as disparate information. These forms can be converted into enterprise applications using j5 IndustraForm and can be linked to j5 Permit to Work, j5 Event Manager and j5 Work Instructions.

## 10. Lockout-Tagout

A Lockout-Tagout (LOTO) procedure is a formal document detailing all the steps required to establish a lockout or tagout. LOTO forms can be filled out by anyone familiar with the equipment. However, they must be reviewed and approved by a LOTO approver with suitable competency. A j5 LOTO IndustraForm Template results in a consistent document, with intelligent approval procedures.

## About Hexagon

Hexagon is a global leader in sensor, software and autonomous solutions. We are putting data to work to boost efficiency, productivity, and quality across industrial, manufacturing, infrastructure, safety, and mobility applications.

Hexagon's PPM division empowers its clients to transform unstructured information into a smart digital asset to visualize, build and manage structures and facilities of all complexities, ensuring safe and efficient operation throughout the entire lifecycle.

Hexagon (Nasdaq Stockholm: HEXA B) has approximately 20,000 employees in 50 countries and net sales of approximately 3.9bn EUR. Learn more at [hexagon.com](https://www.hexagon.com) and follow us @HexagonAB.