



## **3 KEY THINGS ORGANIZATIONS SHOULD CONSIDER WHEN DETERMINING CLOUD READINESS**

**Manage Business-Critical Engineering Documentation in the Cloud with Meridian**

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## WHY SHOULD YOU CONSIDER CLOUD?

### THE EVOLUTION OF THE CLOUD HAS COME A LONG WAY.

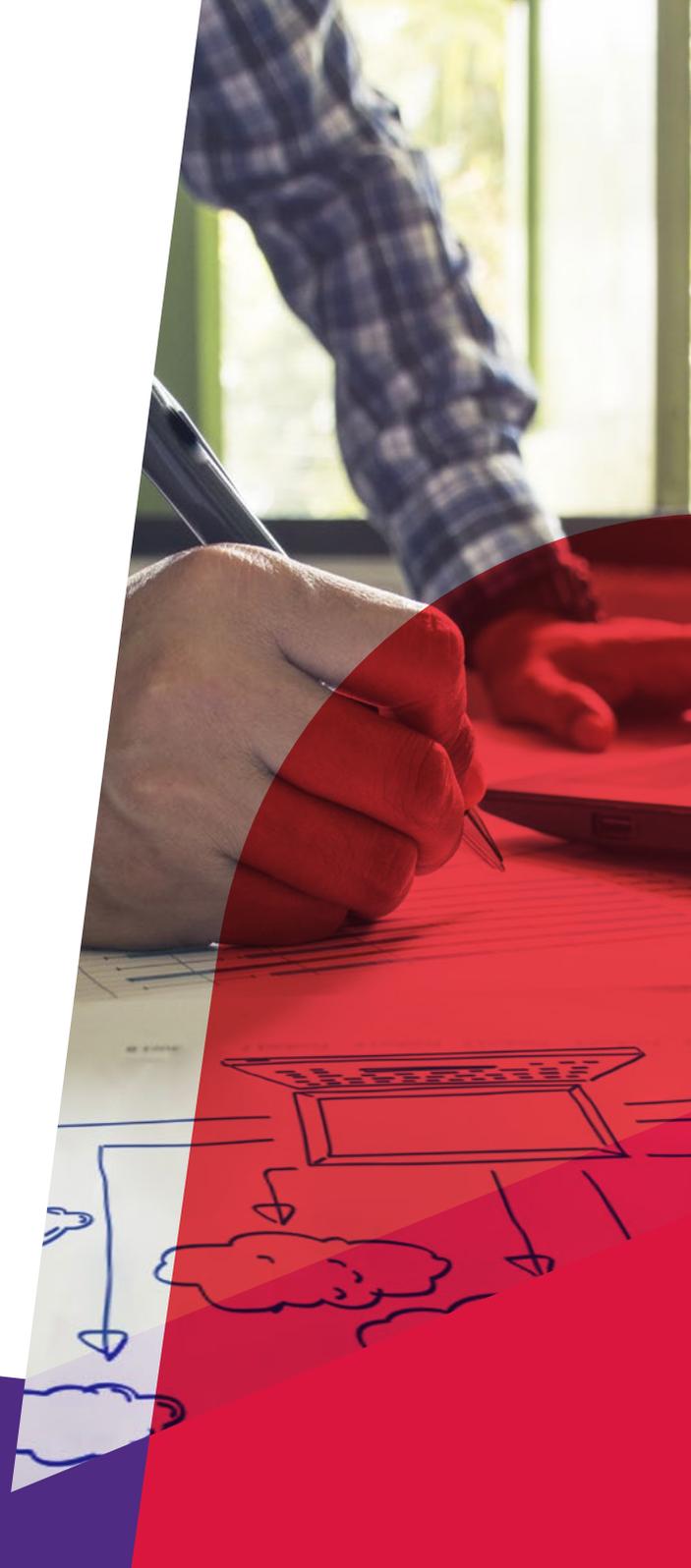
In the 90s, there were standalone servers — each one running just an application or two — that were expensive to acquire, operate and maintain. In the early 2000s came the world of virtualization, a pre-cursor to the cloud, where acquisition was more natural, but organizations were still bound by capacity planning and having to maintain numerous systems.

Then came the cloud. Initially, organizations relied on external cloud providers such as Amazon Web Services, but they are now increasingly adopting public cloud infrastructures where organizations cede more control, but increase their flexibility and can work with a variety of providers, such as Google, Amazon or Microsoft, which operate at extreme scales.

A significant benefit for employing cloud computing is the increase in organizational efficiency and reduced total cost of ownership. When providing an on-premise application, there are capital expenses and planning to do before an organization can utilize a solution. With the cloud, organizations enjoy many benefits:

- Cloud solutions are not bound to any network and can be used from any location on a variety of devices.
- Fast deployment and service are available more quickly than on-premise solutions.
- Cloud applications can quickly scale up and down allowing organizations to use operation budgets versus making significant capital investments.
- Simpler and faster upgrade cycles ensure access to the most recent version of an application.
- Public cloud infrastructure ensures 24/7 human monitoring and fortified data centers are more secure than most corporate centers.

On-premises solutions make it nearly impossible to implement some now vital applications and processes — like Industrial IoT, vendor analysis or automated data integrity checks. However, cloud-based systems make these strategies possible with features like scalable computing, cloud storage and enhanced access to advanced systems. Ultimately, moving to the cloud can open new doors for organizations and allow them to create compelling use cases for their engineering data.



## WHAT CHALLENGES DO ORGANIZATIONS FACE IN THE CLOUD?

While security does provide a benefit in the cloud, some organizations may struggle with ceding the control of security, as it becomes a shared responsibility. In many cases, organizations are already doing this by utilizing tools such as Office 365 and Google.

Organizations may also see concerns with risks and compliance, but there are potential workarounds. For example, government agencies in the United States that require FedRAMP certified data centers can use select, government-specific clouds that run in both Amazon Web Services and Microsoft Azure.

Finally, organizations often worry about change control. While it may seem like there are limited capabilities within the cloud compared to an on-premise solution, cloud products provide the flexibility to take advantage of the latest and greatest product upgrades and offerings because of consistent, seamless updates.

Easy upgrades are a regular part of Software as a Service (SaaS) application updates, meaning that new features are delivered to the customer more rapidly. For instance, Accruent's engineering document management solution, Meridian, provides new functionality and features to our customers once a quarter. Organizations must be prepared for any changes in their SaaS applications that may affect existing training or procedures.

Several of these challenges share a theme — conceding some control and sharing responsibilities. But with this concession comes valuable partnerships. With our Meridian Cloud product, we partner with Rackspace as a Cloud Service Provider, and for our computing base, we partner with Microsoft Azure. Microsoft Azure provides an incredibly rich platform of services for our Meridian Cloud customers. Aside from the array of data centers that allow Accruent to solve the issue of having services in different geographies, we can:

- Speed up our development processes on building new functionality
- Increase reliability and availability of our solution
- Extract more intelligence from the data to help set product roadmaps



## DETERMINING CLOUD READINESS FOR MERIDIAN CLOUD

Accruent's Meridian Cloud provides a best-of-class engineering document management solution for the world's largest facility owner-operators need to manage their facility engineering documentation in the cloud.

Encompassing engineering change management, release management and handover management, Meridian Cloud empowers both new projects and renovations with its integration with Meridian Portal for secure collaboration with external contractors. Fully managed concurrent engineering is supported across multiple projects for internal and external engineering teams, which allows for maximum visibility and increased project efficiency.

Are you ready for Meridian Cloud? To be sure, we will discuss three keys areas of focus:

- Functional fit
- Data Classification
- Compliance with IT Requirements

## FUNCTIONAL FIT

In Meridian Cloud, there are various business processes and workflows based on industry best practices built into the system. Our experienced subject matter experts work with customers to analyze their current business process flows to see if they could fit and work better within the templates set in Meridian.

We then work with the subject matter experts in your organization to identify gaps between your process and the Meridian Cloud solution. This helps our experienced service teams form the basis for your system documentation, configuration and training.



## DATA CLASSIFICATION IN THE CLOUD

Guided by the Process Industry Practices (PIP) standard, documents are organized by a comprehensive metadata scheme for file information, description and classification. Properties that are common to modern engineering best practices are also provided. By following the PIP standard, process industry organizations can feel confident that they are utilizing best practices within their markets.

The data classification model for Meridian Cloud is aligned with these relevant industry standards and best practices. Transferring to this model ensures that organizations are compliant and making the best use of these practices, leading to increased operational efficiency and improved maintenance of your engineering data integrity. The data classification model is broken down by facility and discipline/category data.

Meridian Cloud manages the three most business-critical types of documents:

### 1. FACILITY DOCUMENTS

These are documents that are referenced by various teams in order to perform field maintenance and operations. They are then revised during projects to show critical information, such as facility modifications, documentation updates and as-built drawings. (E.g. flow diagrams, equipment specs, procedures, etc.)

### 2. PROJECT DOCUMENTS

These documents support facility modifications. Typically, project documents are not released as master documents. (E.g. project schedules, meeting minutes and more.)

### 3. GENERIC DOCUMENTS

These are documents that are neither plant nor project-related, but still valuable engineering artifacts. (E.g. pictures, machine code and more.)

Meridian Cloud provides secure storage for all file types, including Microsoft Office documents, 2D/3D CAD documents, and scanned documents. Additionally, Meridian excels in its integration with 2D vector drawings (AutoCAD and MicroStation, including references and hybrids), raster images (scanned legacy paper files and pictures), and generic text files. Simple to complex relationships between documents of any type can be modeled to ensure full change effectivity.

## COMPLIANCE WITH IT READINESS

When organizations are thinking about moving to the Cloud, they need to understand the different areas on which IT will focus. IT is going to be interested in Service Level Agreements (SLA) that the vendor provides, such as uptime of system, incident notice processes, etc., and if the software is going to be SOC.2 compliant. Meridian Cloud is built on Microsoft Azure, ensuring and maintaining compliance.

Four other areas that IT will be concerned about are:

### 1. DATA CONFIDENTIALITY AND CONTROL

Requirements for data confidentiality and control should include a review of existing security needs, as well as other external concerns such as geographical ownership of data and possible regulatory compliance.

### 2. BACKUP AND AVAILABILITY

When reviewing requirements for backup and availability, examine current system downtime along with disaster recovery needs. Current backup schedules and methods should also be analyzed for applicability.

### 3. USER MANAGEMENT

Examination of user management requirements should include a review of secondary authentication requirements, password expiration and complexity requirements, as well as user and group management.

### 4. AUDITING

A review of current auditing practices may be needed to ensure that relevant historical records are maintained. Audit reporting requirements should also be reviewed to provide value and if required, compliance with third-parties.

The resulting analysis of these areas will map directly to users with correct security roles and permissions assigned within the Meridian Cloud solutions.

## CONCLUSION

An increasing number of organizations are moving to the cloud to ensure that they can access information anytime, anywhere. Cloud solutions are also significantly easier to set up and manage, reducing the total cost of ownership.

While there can be concerns with cloud security, the cloud is typically just as secure as the most effective on-premise solution because of the way it utilizes proper security methods, like intrusion detection and prevention systems.

By using Meridian Cloud, organizations can ensure that their engineering documentation is accessible to relevant stakeholders anytime, anywhere.



**CONTACT FOR A DEMO**

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