



The new release of Blue Mountain Regulatory Asset Manager has more compelling “must have” functionality and enhancements than you might expect in a “minor” release. You’ll find new and quicker ways to find and update information in the application, as well as additional functionality to facilitate a global multi-site roll out of the application.

UPDATE MULTIPLE RECORDS IN ONE ACTION

Simply use the pre-existing query and quick find functionality to narrow down the list of records you need to update and then select “Batch Update” from the right-click menu of any record to update fields, change status, electronically sign or shift to a different business process for the desired records. As you would expect, the right to perform these updates can be strictly controlled. Updates made this way are still recorded in the audit trail, documenting that the change was completed as part of a batch process. After the software validates and reports any conflicts with records, the update process is run in the background to allow the user to continue his or her work.

Since it is possible to give specific users the right to adjust records outside of the ordinary business process rules control, your policies on the use of this feature should be carefully evaluated versus your quality procedures and requirements. Because of the different record and rule configurations, the “Batch Update” option is only available for queries limited to one record type (i.e. Calibration Work, not All Work).

Field updates

On the field update tab, the user can specify replacement values for any fields available to that record type. That means you can use this functionality to reassign work to a specific technician, update asset owners or simply clean up issues with legacy data in an efficient and reliable process.

Status updates

Blue Mountain Regulatory Asset Manager will search through the selected records for all records that follow a specified business process rule and that are currently in a specified status to move them to a valid forward, reverse or alternate status. For example, some work items may simply require a review of information available from the query grid before advancing to the next state. The appropriate user can now perform that review and then advance those records without having to open each one.

Electronic signature

Again in the case where the review process can be completed from the query results, the user can not only advance the record to the next state, but also sign off on the selected records before advancing the state. Like the status update, the electronic signature update will also look through all the selected records and report back on any records that are not in the chosen business process and in the appropriate state or not awaiting the chosen electronic signature before confirming the beginning of the batch process.

Shift to new business process rule

Once in the new business process, it may be necessary to advance the records to the appropriate state in that business process.



MULTI-SITE EXPANSION BECOMES EVEN EASIER

The multi-site functionality within Blue Mountain Regulatory Asset Manager allows companies to host the system in one location and share it across multiple sites to lower IT costs and provide a common systems approach across sites while still accommodating differences across sites. However, adding data for a new site to an existing database had been a tricky proposition requiring a day or more of downtime for all current sites while the new data was populated into the system and properly tested to meet regulatory requirements. With this latest release, Blue Mountain now has developed the tools to perform most of the work involved in a data migration – including data mapping, data extraction from legacy systems and ANSI testing – without bringing down the production system. This means that the production system is down only for the final input of the data, typically well less than an hour for even the most data intensive migrations.

FULL LOCAL LANGUAGE SUPPORT

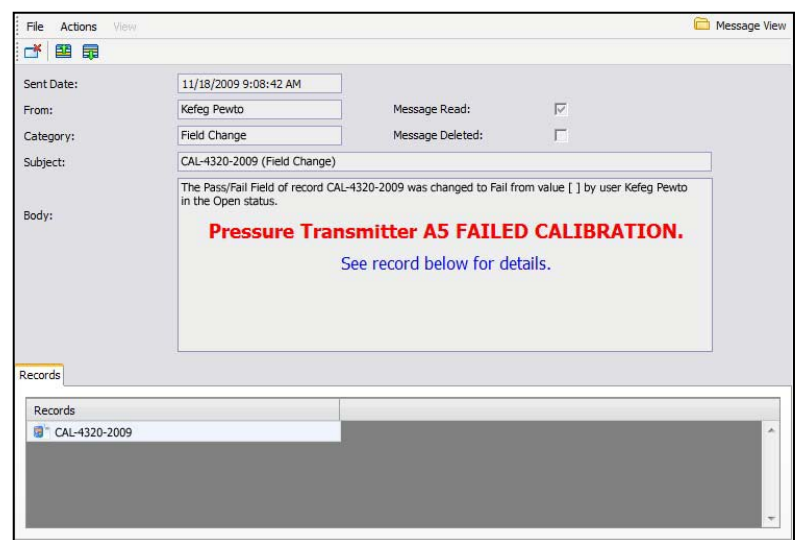
Blue Mountain Regulatory Asset Manager has always provided organizations or sites that operate in a language other than English the ability to configure much of the application in their local language, through configuration of field and tab labels, pick lists, etc. Now all prompts, messages and buttons throughout the application (excluding system configuration) can be localized. Just like each site can choose its cultural settings like date format and currency, so too can each site have its own language configuration, perfect for the global organization with sites in countries across the globe or a single site organization in a region where English is not the primary language.

MORE DETAIL IN NOTIFICATION MESSAGES

Automatic notifications within Blue Mountain Regulatory Asset Manager are an important part of ensuring what needs to get done does get done and when problems arise they are resolved quickly based on solid information. Messages can now be configured to provide additional detail and emphasis to both an external email address and a validated internal email inbox. Additional information from the record referenced in the notification is available for use in the message, including any field label and value, and reasons and comments for field changes and status changes. Additional text added to the core message can also be formatted using standard HTML to provide greater control over appearance and placement of text. With this new functionality, and the help of Blue Mountain available to those who need it, advanced users and basic users can create detailed and impactful messages.

AUDIT REASON PICKLIST

Blue Mountain Regulatory Asset Manager can now be configured to use a user-defined picklist for audit reasons, allowing companies to enforce consistency in audit reasons. Whether a picklist or a textbox is used is a form-level option, meaning a picklist could be used for work and asset records, and a textbox for events records. Different record types can use different lists, so calibration and maintenance work can each have different picklists.





MEASUREMENT DATA TEMPLATES, NOW EVEN EASIER

Measurement data templates (MDT) allow customers to control set points and tolerances for calibrations while at the same time dramatically reducing the effort required to perform field calibrations. With this release, it becomes easier to create a new measurement data template and allows users to choose a measurement data template for unplanned (“On Demand”) calibrations.

Now there is a new button in measurement data collection to copy the configuration from the active measurement data collection to create a new MDT. Newly created MDTs enter the appropriate business process just as an MDT created from scratch would, so they can go through complete review before it can be applied to work. This means that customers can enter new MDTs all at once as part of a coordinated effort or as needed when the calibrations come up, eliminating the need for dedicated resources to the undertaking.

Additionally, MDTs can now be applied to “On Demand” work. So if after unplanned emergency maintenance work the instrument needs to be recalibrated the metrologist can create an “On Demand” work record using the same measurement data template he or she would use for its scheduled calibration. And with the pre-existing ability to have the MDT calculate the exact measurement data points calculated as percentage points of operating range, this MDT applied to the “On Demand” work need not even be specific to that instrument, making it easy to standardize approach across similar assets.

RECENT QUERIES LIST

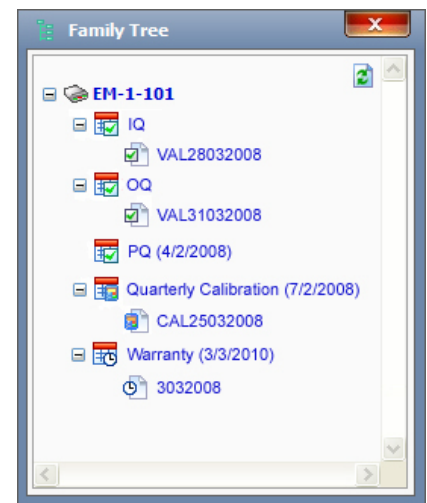
Users can quickly get to frequently used records through the recent queries list available on the home page immediately after logging in and on the queries tree. This allows engineers and technicians to get to their open or upcoming work lists with one click from the home page and quality personnel can see what items are awaiting their signature with one click from the home page.

QUICK SEARCH AND BARCODE SEARCH

From anywhere in the application, users now have access to a quick search bar to get instant access to records. Users simply start typing in the record id and as they type a list of matches will be displayed. Once the result set is narrowed to a single item that record will automatically open. This not only gives quick access to records for ordinary users, but gives users armed with a barcode reader the ability to simply click on the search bar and scan a barcode to open a record quickly and easily. Searches can be refined by specifying the record type to search for (assets, work, requests, etc.)

NAVIGATION THROUGH THE FAMILY TREE

The Family Tree gives a view of all work and event records associated with the current asset. Now users can navigate to records in the tree in either edit or view mode, opening up the record in a new window. Users can also create new work for an asset directly from the navigation tree. So if a validation professional is working on a revalidation of an asset, he or she can quickly see a history of activity for that asset and pull up detail on any of the records instantly.





PART WHERE USED LIKE ASSET WHERE USED

It is now possible to discover within the application where spare parts were used like you would to discover where an asset was used in the production of a lot, as a standard, etc. So if, for example, a part is recalled or discovered to be defective a user can quickly pull up a list of where that part was used during a designated timeframe so quick action can be taken. The advantage of doing this within the application is that the user can click on any of the resulting records to view detail on any specific work orders for which the part was used.

GREATER CONTROL IN LOCATION EXPLORER

The Location Explorer is the tool within Blue Mountain Regulatory Asset Manager for establishing and viewing the hierarchy of locations. Now users can control the order in which locations at the same level appear to better reflect the facility's layout. Simply add a new location at the right place in the list or move an existing location up or down in the list with intuitive up and down arrows.

YEAR IN AUTOMATIC SEQUENCES

Blue Mountain Regulatory Asset Manager provides the ability to configure unique sequences, for example to automatically increment for each new record (i.e. work IDs, asset IDs, etc.). Many companies include the current year in these sequences. Now the date can be included automatically anywhere in the prefixes and suffixes.

USER SORTING OF QUERIES

In addition to being able to establish default sorting in the query configuration, users can now resort the query results. Users simply click on any column header to sort the entire result set by that column.

HASSLE-FREE UPGRADE PATH

This minor new release (Blue Mountain Regulatory Asset Manager Release 2 – Service Release 2) also includes some user interface enhancements. With all the application enhancements we strongly encourage companies on previous versions to upgrade. For companies coming from recent versions, the upgrade path to this new version is quite short. To minimize the impact to ongoing operations Blue Mountain offers and recommends the following services:

- Installation and upgrade of data (1 day)
- Pass / Fail validation (2 days) – upgradeable to include screen captures
- Training – new functionality plus refresher (2 days)

Get up and running on the latest version and improve usage all at once!