



Effectively Manage Trade Secrets using Process Safety Enterprise®

An ioMosaic White Paper

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Overview

Process Safety Enterprise® (PSE), a cloud-based platform, helps manage Trade Secrets, ensuring compliance with OSHA's PSM standard. This white paper details the key features of PSE, including:

- Document Control System: Easily stores and retrieves documents
- Intelligent Form Builder: Creates customizable forms
- Action Tracking System: Manages all tasks related to Trade Secrets
- Reporting and Dashboard/KPI: Provides real-time insights into activities
- Trade Secrets Workflow: Guides users through identifying and managing trade secrets that could impact the execution of the PSM program.

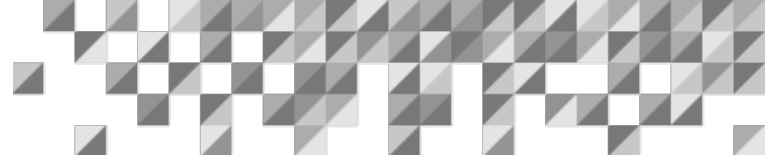
Introduction

Managing Trade Secrets is essential to complying with the Occupational Health and Safety Administration (OSHA) Process Safety Management (PSM) 29 CFR 1910.119 standard. This element includes identifying whether trade secrets exist and managing them if they do. Trade Secret management ensures that personnel who support the PSM program have the critical information they need to manage the process hazards effectively.

Businesses often encounter challenges in managing trade secrets since they must protect vital information while ensuring the safety of their people and assets. The process can include executing non-disclosure agreements where needed and managing who is allowed access to the information, which demands considerable time and resources. Overlooking these responsibilities risks the safety of employees, plant assets, the community, and the environment. Moreover, an accident could lead to production interruptions.

An effective Trade Secret program should include identifying whether trade secrets exist and if PSM personnel need the information to manage the process hazards. The Trade Secret workflow ensures that trade secrets are considered, identified (if they exist), and managed within the PSM program. A document management system is needed to create and store non-disclosure agreements and sensitive information that can only be accessed by approved individuals.

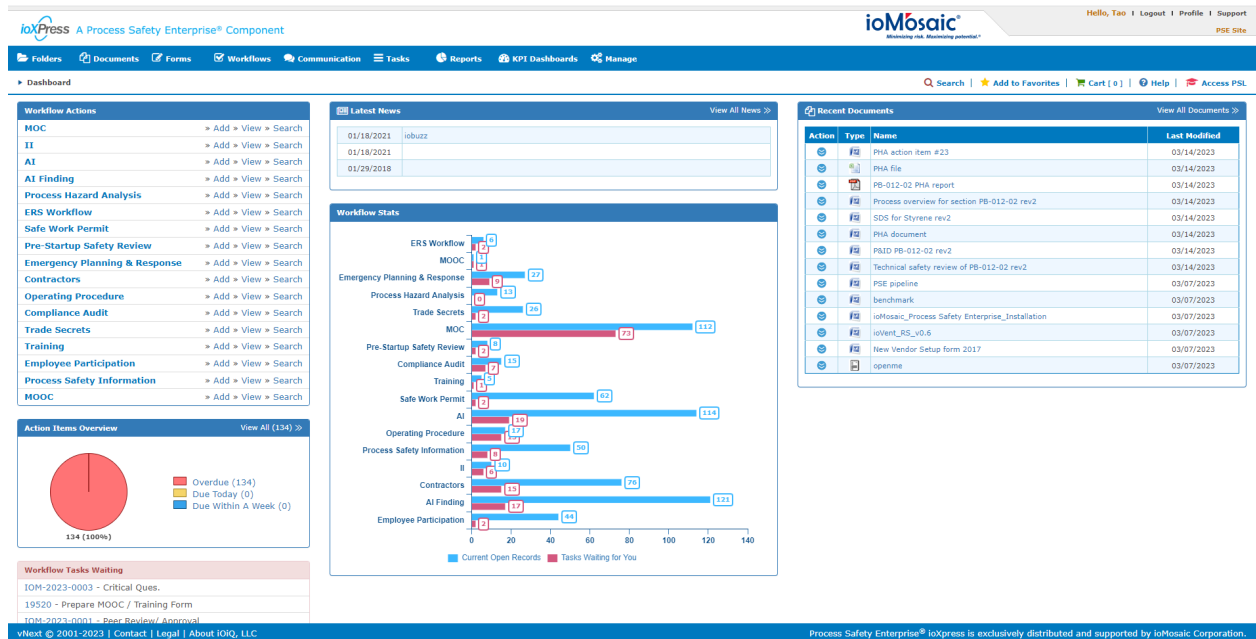
Effective Trade Secret systems help companies document, plan, execute, and store required assessments and the granting or removal of rights to trade secrets. This workflow can help companies comply with the PSM requirements of the 29 CFR 1910.119 standard.



For businesses serious about implementing a comprehensive PSM compliance system, ioMosaic offers the Process Safety Enterprise® (PSE) (Figure 1). PSE is a cloud-based platform enabling easy ongoing management of process safety data, helping businesses achieve compliance, manage risk, and remain competitive. Unlike any other system available in the market today, PSE is a centralized web-based application that integrates all PSM elements and workflows, making it THE ultimate solution for managing trade secrets effectively. This white paper delves into the key features of the Trade Secret workflow and how it benefits companies seeking to improve and elevate their systems to manage the hazards of trade secrets that can impact the PSM program.

To help you better understand the requirements of the PSM standard, we recommend a [PSM Essentials eLearning course like the one offered by Process Safety Learning®](#).

Figure 1. Process Safety Enterprise® (PSE)



Source: ioMosaic Corporation – PSE

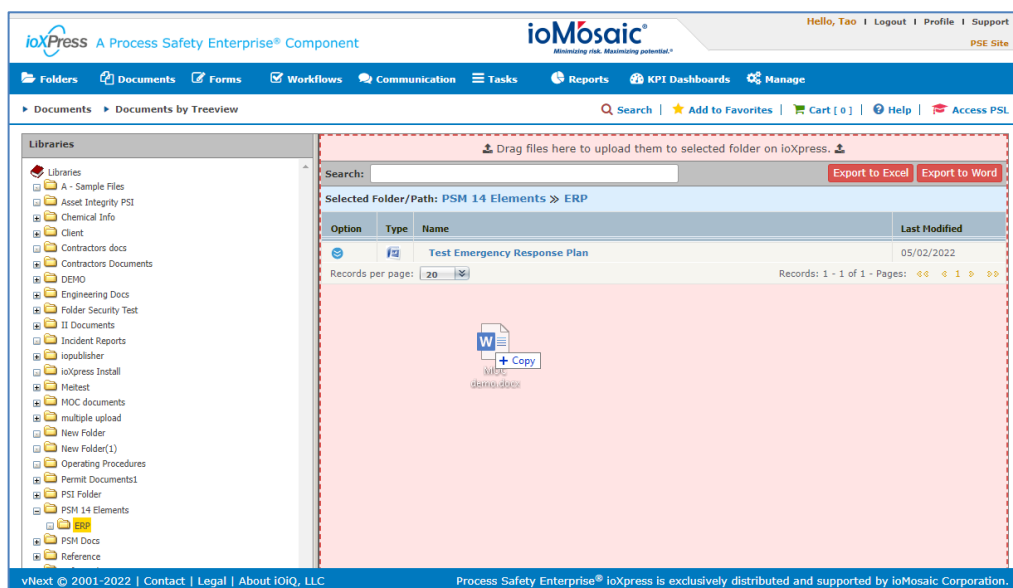
Document Control System

The document control system of PSE's platform is a key component for facilitating easy access to all critical process safety data. It allows users to easily access and add documents using a simple drag-and-drop (Figure 2) feature. This action quickly organizes documents into folders for easy retrieval. Its advanced search function indexes all documents with full text, allowing users to find necessary information quickly. An embedded document viewer feature not only enhances accessibility but also bolsters security measures. By granting users view-only permissions, they



can view documents as images, preventing unauthorized downloads and eliminating the need to log into their computers for access. This document control component is an effective tool for managing various types of data, including but not limited to non-disclosure agreements, engineering data, process safety information (PSI), equipment forms, procedures, records, pictures, videos, animation, and reports. This component further ensures that all stakeholders have easy access to vital information related to Trade Secrets stored in a centralized location.

Figure 2. Drag and drop feature to add document(s)



Source: ioMosaic Corporation – PSE

Intelligent Form Builder

PSE also includes an intelligent form builder for efficient data capture and linking to documents in a central digital library. This dynamic form builder enables users to create practical, customizable forms to manage trade secrets.

The ability to customize forms for unique requirements or approvals ensures that all necessary data is captured accurately and consistently. Moreover, this feature allows for easy export of data to an Excel format, making data analysis and sharing even more seamless. Implementing a customizable form builder like the one in PSE streamlines a Trade Secret process by capturing data accurately and efficiently.

Figure 3 shows an example of the Trade Secret form.

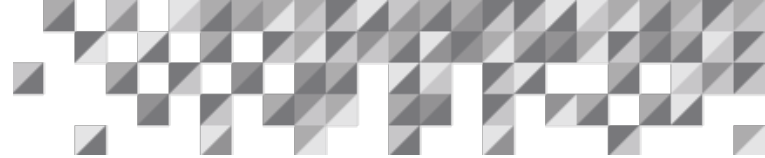


Figure 3. Example of Access Removal Form for Trade Secrets

Short Description		MOG Test 1							
*Originator *		Tao Yao							
Process/Facility		CTO Plant Storage							
*Reason for Approval Removal *		Individuals have left the company							
Individuals to be Removed	Check to remove	Name of Employee	Type of TS Access	Date of Approval	Comments				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tao Yao	Full access	4/25/2022	test				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	David Blake	Other	5/5/2022					
Add New Row									
Companies to be Removed	Check to Remove	Name of Company	Company Contact Name	Company Contact Email	Type of TS Access	Executed NDA File	Date of Approval	Comments	
<input checked="" type="checkbox"/>	<input type="checkbox"/>				Other		5/5/2022		
<input checked="" type="checkbox"/>	<input type="checkbox"/>				Full Disclos		5/13/2022		
Add New Row									
Detailed Reason for Trade Secret Access									

Source: ioMosaic Corporation – PSE

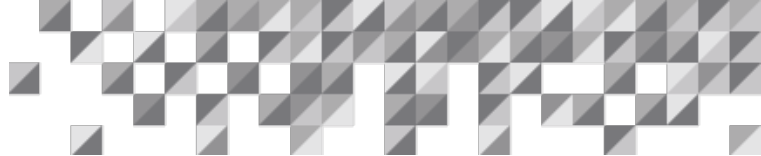
Trade Secrets Workflow

PSE is the only process safety platform integrating all of OSHA's Process Safety Management (PSM) elements using visual workflows in a single enterprise system. This workflow includes PSM's 14 elements, action tracking modules, and document control. The Trade Secret workflow allows you to manage the approval and removal of access to trade secrets while documenting non-disclosure agreements and information related to the trade secrets in highly protected folders.

The Trade Secret workflow establishes steps for identifying and managing trade secrets when they exist and can impact the PSM program. Non-disclosure agreements, approval to access this information, and removal of access can be tracked within this workflow. Approvals can be company-specific.

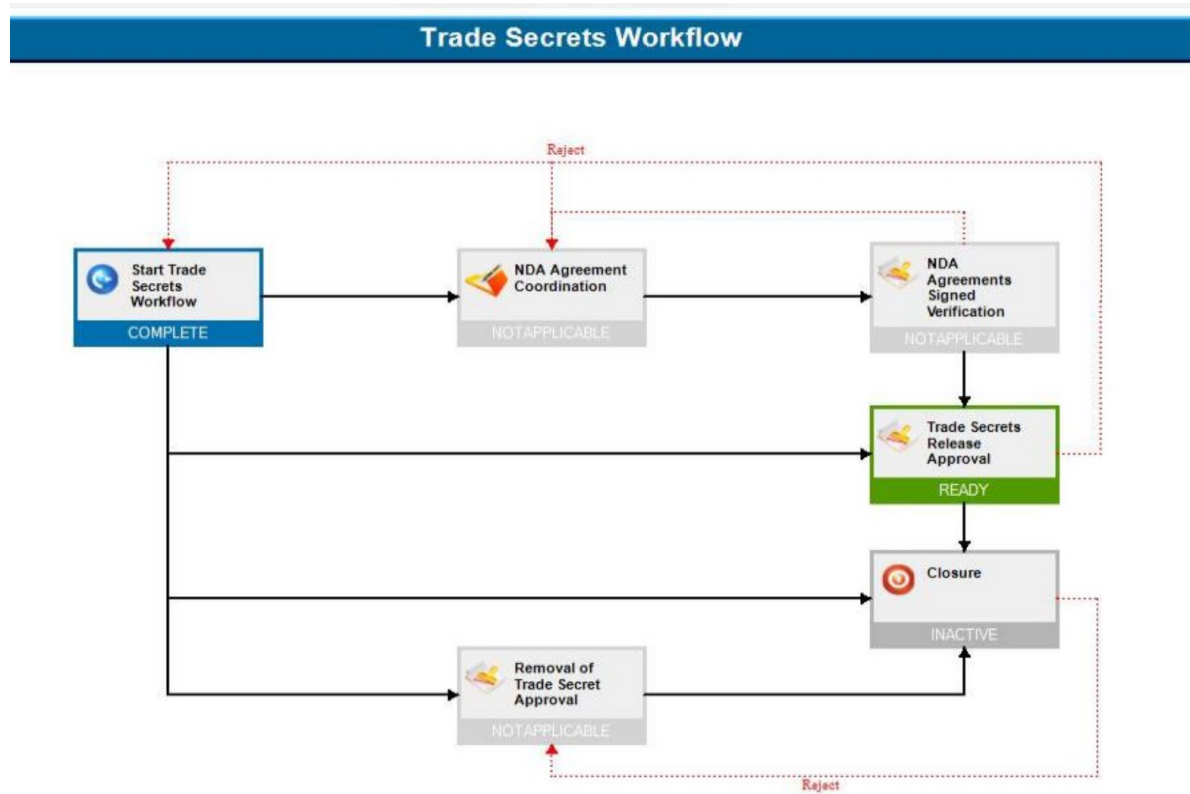
This workflow (and all PSE workflows) is easily customized to meet the specific needs of any company.

Figure 4 illustrates the Trade Secret workflow steps. Completed steps are in blue, Inactive steps in light gray, Not applicable steps in dark gray, and Ready steps are in green. The workflow can only be closed once all required steps are completed.



The Trade Secret workflow within PSE ensures trade secrets are identified and managed if they can impact the PMS program per the OSHA standards and guidelines.

Figure 4: Example of Trade Secret Workflow



Source: ioMosaic Corporation – PSE

Action Tracking System

PSE features a comprehensive action item management system (Figure 5). It tracks all tasks related to each process safety management workflow, such as the approver seeking additional information before granting trade secret access. This feature ensures that all action items are managed within the platform, reducing or eliminating the risk of overlooked or forgotten tasks. An additional feature, the 'Automatic Reminders,' enforces all tasks to be completed on time.

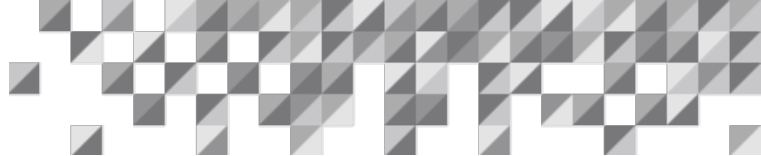


Figure 5. Trade Secrets Action item

View Action Items

Workflow: Display Action Item [Edit](#)

Information

Action Item ID:
5889

Elapsed Time:
0 day(s)

Assigned By:
Dianne Coon

Date Entered:
4/29/2024 2:16:01 PM

Last Modified By:
Dianne Coon

Date Modified:
4/29/2024 2:16:02 PM

Details

Assigned to:
Dianne Coon

Description:
Please explain how this person is involved in the PHAs and why they require access to the related trade secrets.

Action Taken:

Notify List:

Comments:

Workflow Information

Workflow Module:
Trade Secrets

Workflow Form Item:
[18485](#)

Workflow task:
Trade Secrets

Source: ioMosaic Corporation – PSE

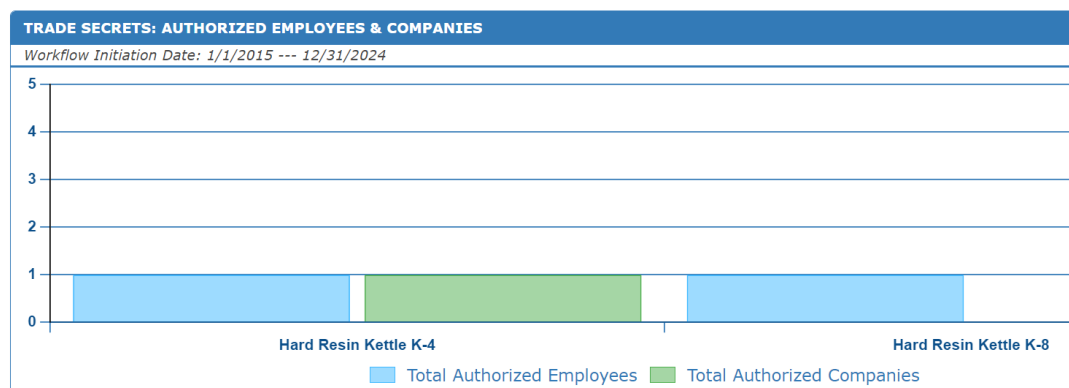
Reporting and Dashboard/KPI

An effective dashboard (Figure 6) is an invaluable 'must-have' asset for any data-driven enterprise looking to increase performance and productivity. Well-designed dashboards featuring various widgets such as bar charts, pie charts, line charts, and tables provide a comprehensive overview of the PSM program from a single source. These dashboards allow business owners to make quick, informed decisions at a glance based on real-time data.

Moreover, the reporting and dashboard capabilities provide real-time visibility into managing trade secret access, allowing organizations to identify trends and areas of concern quickly. This capability enables timely corrective action, reducing the risk of incidents and non-compliance. PSE's robust reporting and dashboard/KPIs are essential for protecting trade secrets while ensuring that specified personnel have access to important information that can impact the PSM program.



Figure 6. Dashboard/KPI



Source: ioMosaic Corporation – PSE

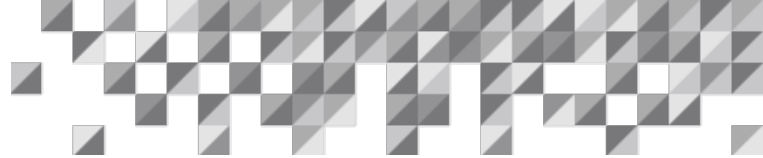
Case Study – The Consequences of Not Managing Trade Secrets

The Challenge

Companies may protect innovative technology by treating it as a trade secret. A trade secret is any practice or process of a company that is generally not known outside of the company. This information can give the company a competitive advantage and is often a product of research and development.

The trade secret may sometimes include a particular raw material or process covered under the PSM standard. In these cases, employers must provide designated individuals with all necessary information to comply with PSM. Personnel who develop Process Safety Information (PSI) and operating procedures and investigate incidents must have this information. The necessary information must also be provided to key personnel conducting Process Hazard Analyses (PHAs), creating emergency plans, responding to emergencies, or auditing the covered process.

If this critical information is not shared with the relevant personnel, the consequences of the hazards cannot be assessed and managed. The PSI may lack critical information, such as the impacts of inadvertent mixing, reactivity, and toxicity. Operating procedures may not address the order of addition or ways to avoid or mitigate the hazards of the trade secret. PHAs may not identify the safeguards needed to eliminate or mitigate the hazards. Without this information, incident investigations may not discover the root cause of an incident, which could lead to a future incident. Emergency response plans may be incomplete and create unnecessary hazards for the emergency responders, and auditors may miss crucial gaps in the PSM program if these hazards are not disclosed.



If trade secrets can impact the covered process, the necessary compliance information must be disclosed to key personnel to allow them to understand and address the trade secrets' hazards. Failure to do so can result in catastrophic events due to missing hazard information that is not managed or mitigated as required by the PSM standard.

Our Approach

The Process Safety Enterprise® Trade Secret Workflow is a cloud-based platform that provides a centralized database accessible and visible to all employees and contains a step-by-step guided workflow. This workflow can minimize or eliminate potential catastrophic events related to trade secrets by ensuring relevant personnel have controlled access to the required information.

Additionally, PSE can integrate multiple sites and various data into one uniform system (which would have further minimized the incident) by:

- Developing a unique ID system to differentiate facilities and areas
- Setting up sign-on access for users at all facility sites
- Identifying and developing consistent data definitions and Key Performance Indicators (KPIs)
- Standardizing search queries to ensure data quality
- Devising site-specific and corporate reporting capabilities

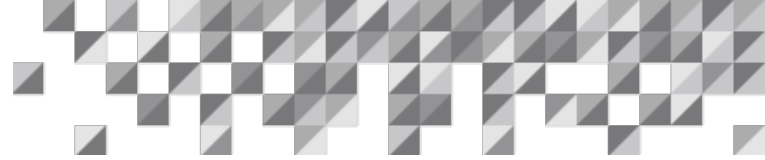
Customizable workflows are available within PSE and can assist with creating unique trade secret forms.

PSE's built-in features, such as the automatic assignment of approvals, action item tracking, document linking, and email notifications, all contribute to ensuring the documentation and execution of Trade Secrets are properly captured, accessible to identified personnel, and protected from others.

The Benefits

For companies serious about their process safety compliance and Trade Secret process, PSE is a user-friendly platform with workflows for document control that is scalable and affordable.

The Trade Secret workflow streamlines identifying and controlling relevant trade secrets while documenting any non-disclosure agreements. The ability to control who can view the trade secrets and agreements is a standard feature of PSE.



Finally, the PSE workflows have KPIs that track open workflows and the percentage of open or overdue workflows. The KPIs are graphed with interactive data, allowing you to drill down to the specific data. Reports can also be generated to view the status of all workflows.

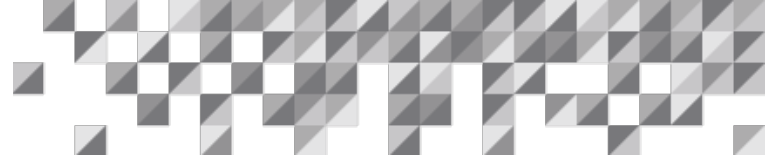
Conclusion

Managing Trade Secrets effectively and consistently can be challenging; fortunately, Process Safety Enterprise® (PSE) provides an integrated solution that makes the process more efficient and effective. With its dynamic form builder, action tracking feature, and integrated workflows to standardize the process, companies reduce the risk of incidents and non-compliance.

PSE offers additional benefits, including enhanced collaboration, improved data management, and increased compliance with process safety regulations. With the reporting and dashboard capabilities, organizations can easily identify trends and potential areas of concern, gaining real-time visibility into all process safety-related activities. The automatic notification system sends reminders and alerts, ensuring items are addressed in a timely manner.

PSE's customizable Trade Secret workflow module initiates, approves, executes, and completes the required steps to identify and manage relevant trade secrets. This process ensures that all necessary information is captured and protected in one centrally located platform.

PSE is the only product of its kind in the market today that provides an all-inclusive process safety compliance platform that makes compliance easy.



Authors

1. Jian Lan: lan.j.nh@iomosaic.com
2. Dianne Coon: coon.d.nh@iomosaic.com

Useful Links

PSE [link](#) to software demo requests

PSE [link](#) to PSE overview

PSM Essentials Training [link](#)

Additional PSE White Papers:

[PSM Compliance Made Easy with Process Safety Enterprise®](#)

[Effectively Manage Mechanical Integrity with PSE](#)

[Effectively Manage Processes Chemicals Equipment and Personnel with PSE](#)

[Process Safety Enterprise® Asset Integrity Management Service \(AIMS\) and KPI Dashboard](#)