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Multi-Site EHS Software Evaluation Checklist

Define requirements, run consistent vendor demos, and score platforms against real multi-site energy operations. From Validere's EHS management software guide.

Guiding principle: Standardize the controls without forcing every local detail to be identical.

1. Define your operating context

Check all that apply. Your mix of sites and obligations should drive configuration and integration requirements.

- | | |
|--|--|
| ☐ Upstream oil and gas | ☐ Midstream / pipelines |
| ☐ Refining / processing | ☐ Utilities / power generation |
| ☐ Multi-province / multi-state | ☐ Growth through acquisition |
| ☐ Remote / low-connectivity sites | ☐ Heavy spreadsheet reporting today |

PRIMARY WORKFLOWS IN SCOPE FOR PHASE 1

- | | |
|--|---|
| ☐ Environmental inspections | ☐ Permit tracking |
| ☐ Incident / near-miss | ☐ Corrective actions |
| ☐ LDAR | ☐ Engine / stack testing |
| ☐ Waste / water | ☐ Management of change |
| ☐ GHG / air reporting | ☐ Mobile field capture |

2. Operating-model decisions (answer before demos)

Bring these answers to every vendor conversation. Software configuration should follow the operating model, not invent it.

1. Which controls must be corporate-standard across every site?

Ownership · Approvals · Evidence · Calculation governance · Reporting standards

2. Which requirements genuinely vary by facility?

Permits · Inspection frequency · Asset types · Jurisdictions · Escalation paths

3. Where does each critical data point originate today?

SCADA · Historian · ERP · CEMS · Lab · Field tools · Spreadsheets · Email

4. Who owns calculations, factors, mappings, and business rules?

5. What will field teams realistically use offline and on mobile?

6. Which existing systems should remain in place for phase 1?

7. What is the first high-value process or reporting problem to solve?

3. Demo script — run this with every vendor

Request a demonstration using your facility and asset structure. Do not accept a polished dashboard tour under ideal conditions.

Step 1: Two sites, different requirements

Show two facilities with different permit conditions or inspection frequencies under one corporate governance model.

Notes: _____

Step 2: Source-system handoff

Ingest or import a realistic operational record. Show facility/asset mapping, validation, and what happens before the value can be used.

Notes: _____

Step 3: Missing or unusual data

Break the happy path. How are incomplete records, late readings, or failed validation rules flagged, assigned, and resolved?

Notes: _____

Step 4: Field-to-office continuity

Complete an inspection (ideally offline). Show attachments, findings, corrective action routing, and visibility for the next reviewer.

Notes: _____

Step 5: Reporting beyond the PDF

Walk from source data through calculation, exception, review, evidence, and export. Confirm the process is governed, not only the final output.

Notes: _____

Step 6: Audit drill-down

Start from a reported or approved value. How quickly can you reach collector, source system, rule/calculation, reviewer, and evidence?

Notes: _____

4. Seven-capability scoring matrix

Score each vendor 1–5. Weight capabilities that matter most for your phase 1 use case.

Capability	Vendor A	Vendor B	Vendor C	Notes / proof seen
1. Site- and asset-level configuration				
2. Environmental and safety workflow coverage				
3. Integration with operational source systems				
4. Mobile and offline field workflows				
5. Data validation and exception management				
6. Regulatory reporting automation (process, not only export)				
7. Governance, auditability, and enterprise controls				
Weighted total				

5. Maturity self-check

Where is your program today? Circle one per row.

Area	Digitized	Centralized	Connected
Inspections / field work			
Source data for compliance			
Calculations / business rules			
Corrective actions			
Regulatory reporting			

6. Red flags

- ☐ Demo only shows dashboards and final report templates
- ☐ Cannot represent site-specific requirements without a separate instance
- ☐ Integration means CSV upload with no mapping or validation story

- ☐ Offline / mobile not demonstrated with actual field users in mind
- ☐ Calculations live in undocumented spreadsheets outside the platform
- ☐ Missing-data and exception handling are afterthoughts
- ☐ Every configuration change requires vendor custom development
- ☐ Implementation plan assumes identical processes at every site
- ☐ Security / audit claims cannot be confirmed in writing

From Validere's guide: EHS Management Software for Multi-Site Energy Operators
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