

# Foundational Data Checklist

- ✓ **Equipment Number** – This number represents the cradle-to-grave number typically assigned to a physical asset within the facility. In most cases this number is or should be non-intelligent.
- ✓ **Equipment Description** – This is a description of the physical asset associated with the Equipment Number.
- ✓ **Functional Location ID** – This field stores the functional location identifier where the physical asset resides. The functional location can point to a record in another table or within the equipment table. It also describes the process or the service that the physical asset performs. This ID typically has intelligence embedded into it.
- ✓ **Function Location Description** – This is a description of the “Functional Location” associated with the Functional Location Number. In most cases the description includes process, service or geographic information.
- ✓ **Physical Location** – This field can contain a reference to an area, building, floor, room or column where the equipment is installed.
- ✓ **Manufacturer** – MaxGrip typically finds a mixture of Original Equipment Manufacturer (OEM) and vendor names in this table. Accurate and consistent identification of the OEM is crucial to developing accurate Bill of Materials (BOM’s) or spare parts lists in the future.
- ✓ **Model Number** – This is the standard model number included on most nameplates. Values in this field are frequently missing or are inconsistently entered.
- ✓ **Serial Number** – Standard serial number included on most nameplates. Values in this field are frequently missing.
- ✓ **Class (Equipment Class)** – This is a simple noun that describes the parent class or type of equipment. Examples: Pump, Conveyor, Compressor, etc.
- ✓ **Sub-Class (Equipment Sub-Class)** – Used to further breakdown an equipment class. Using the class of Pump as an example, the subclass for Pump could be: Centrifugal, Vacuum, Reciprocating, etc.
- ✓ **Priority (Criticality)** – This field is used to indicate the ranking of equipment relative to each other. In most cases the client has made an attempt to perform this vital function. However we frequently find that the ranking criteria were not consistently applied and are not justified in a quantitative manner.

# Equipment Strategy Session

A major element in determining the “format” of the equipment and location records as they relate to a specific CMMS is the **Equipment Strategy Session (ESS)**. The results of the session will provide very specific direction as to how the data will be formatted for final load. This session should occur prior to the commencement of the walkdown. Primary elements of a typical session would include decisions on the following:

- ✓ **Equipment Numbering Convention**
- ✓ **Equipment Description Convention**
- ✓ **Functional Location Numbering Convention** (If applicable)
- ✓ **Functional Location Description Convention** (If applicable)
- ✓ **Class/Sub-class Structure**
- ✓ **Naming Convention**
- ✓ **The difference between equipment and components**
- ✓ **Equipment Unique Identifier naming convention** (e.g. Motor = MTR)
- ✓ **Granularity of Equipment Database** – (To what extent will equipment be broken down into actual CMMS equipment records?)
- ✓ **Hierarchy development and the Parent/Child relationship**