

Equipment Maintenance Checklist

The Preventive Equipment Maintenance checklist

Machines and equipment malfunctions are scary and expensive issues. The consequences often lead to unexpected machine downtimes, prolonged repairs, higher service costs, interrupted production runs, or elevated expenses for spare parts. So, what is the way to fight them?

Preventive and predictive equipment maintenance strategy can save a lot of these struggles and unplanned money spending. The specially designed inspection procedures help to prevent equipment malfunction, enhance worker safety, improve resource management, and increase machine uptime. In this blog, you can learn about the specifics of preventive maintenance and how to start utilizing the [free and ready-to-use preventive maintenance checklist](#) for manufacturing within the Resco Inspections app.

What is preventive maintenance (PM)?

Preventive maintenance (or preventative maintenance, as often spelled) is a set of regularly performed procedures that companies utilize to prevent unexpected plant or equipment downtimes. The process includes planned inspections of the organization's assets and scheduling for their replacement or service.

As [explained](#) by the American National Standards Institute (ANSI), preventive maintenance includes adjustments, cleaning, lubrication, repairs, and replacements, but it is not limited just to these. There are various types of preventive maintenance procedures, from which the most frequent are time-based, predictive, and [risk-based inspections](#).

A similar, but specifically defined type is predictive maintenance (PdM). While often used jointly with PM, predictive maintenance uses a unique set of techniques that help to determine the condition of equipment to predict its necessary maintenance. It is scheduled as needed and doesn't need to be performed periodically.



Which industries mostly benefit from equipment maintenance?

Various industries can hugely benefit from equipment maintenance as a part of preventive/predictive maintenance. It is most effective in sectors where a company manages a lot of tools and machines, which are complicated to administer and keep in top condition without regular checks. And also industries where critical equipment can cause long-term or severe damage to production. Preventive maintenance is, therefore, mostly utilized in these industries:

1. Manufacturing

The manufacturing industry [has to deal with a lot of challenges](#), and asset management is one of the most crucial. The vast number of equipment and critical machinery increases the possibility that something goes wrong. But that also creates an opportunity for efficient, proactive management. [Tailor-made software](#) can help manufacturers to get regular information about the condition of the production line and necessary repairs in advance.

2. Construction

Large building sites require heavy machinery and construction equipment, where preventive maintenance can be more cost-effective than a reactive approach (break -> fix). Also, it increases safety measures for workers and helps them to follow guidelines and regulations.

3. Oil and Gas

In the Energy and Oil & Gas sector, a predictive strategy is used more than preventive maintenance. Condition-based maintenance proves to be more cost-effective over the time-based approach and is increasingly utilized over the whole energy industry. Therefore, a [fully customizable inspections solution](#) can empower businesses to solve more issues at once. The adoption of PdM can help in monitoring the condition of complex infrastructure and equipment like oil pumps.

How can companies utilize Resco's Equipment Maintenance Checklist?

The first set of questions: Equipment details

Within the first part of the Equipment Maintenance Questionnaire, the inspector identifies the equipment. He can choose what Type it is (machine tool, construction equipment, etc.) and also include the Manufacturer or Maintenance provider. With the date of purchase field, users can evaluate if a time-based replacement is needed (some product tend to have an expiration date, or are safe to use for just a certain amount of time).

The second set of questions: Equipment Maintenance

After equipment identification, maintenance details can be attached to the report. Inspector can include a text description, periodicity, and also a photo of the equipment. Visual information helps to quickly identify equipment type and condition. With date settings, the user is able to schedule the time for the next required maintenance.

The third set of questions: Recommended Action

Equipment Maintenance Checklist enables to add recommendation of the inspector based on equipment condition. If a repair, replacement, order, or other action is necessary, the text description field enables to include more in detail information, so anyone reading the report has all the essential information at one place.

The fourth set of questions: Conclusion

After all the necessary steps of the inspection were conducted, results can be summarized in the final part of the questionnaire. Was the inspection satisfactory? When was it held? And what is the recommended date for the follow-up actions? Also, the inspector's signature is necessary for the validation of results.

Complete the questionnaire with a report

To complete (or cancel) the Equipment Maintenance Checklist, the inspector should navigate to the hamburger menu in the top right and select the appropriate option. If the user exports a report, he can send it directly to the customer, manager, or back-office – right from a smartphone or tablet.

How to access the Equipment Maintenance Checklist?

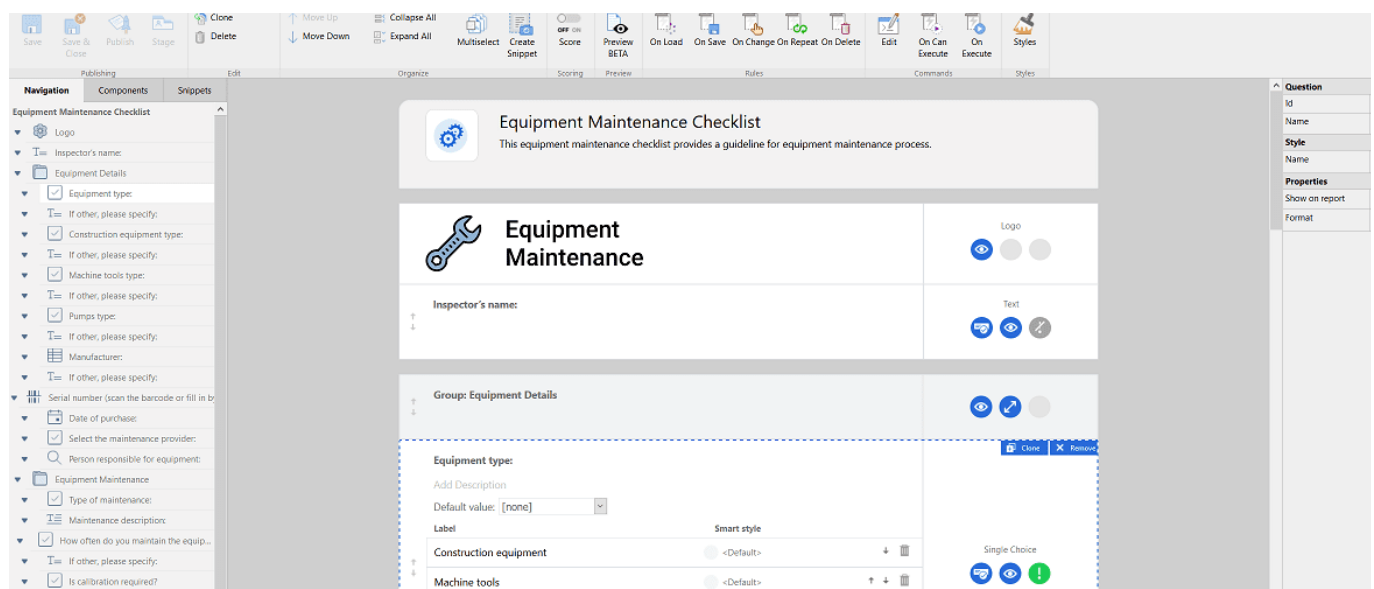
The predefined template is free to use and you can find it in [Resco template library](#). When using Resco Inspection app, you can access the Equipment Maintenance Checklist from the navigation menu *Templates -> Equipment Maintenance Checklist*. For users that haven't tried Resco Inspections yet, there is a [30-day trial](#) allowing to try the questionnaire for free.

In Resco Inspections, you can also find other predefined and ready-to-use manufacturing questionnaires for Quality Assurance and Health & Safety Assessment. Templates for Energy and Property Maintenance sectors are also available and free to use. Resco Inspections can be also directly integrated with [Microsoft Dynamics](#) or [Salesforce](#), to access key business data on the go.business unit at a time. And then keep expanding.

Also remember that many companies put a lot of energy to pilot projects and lost their commitment later. Successful digital transformation requires continued support and attention.

How to customize Resco's Equipment Maintenance template?

Customization adds a lot of flexibility and opportunities to fit questionnaires to your specific requirements. Users of Resco Inspections can easily adjust the questionnaire within the Questionnaire Designer and also utilize it for other industries.



To access customization options, open the Questionnaire Designer from the main Resco Inspections console. Afterward, enter the Manufacturing folder and click on the Equipment Maintenance Checklist. From there, users can customize the template without any limits. To design the look of an app and what information can user see, proceed through the Form Table Designer and Forms in Woodford guides.

Variable questions

A predefined set of questions allows inspectors to identify inspected equipment/machines, evaluate its condition, or schedule the planned maintenance. But user can use various other types of questions within the Equipment Maintenance template. System admins can choose different question types that best fit the on-site practice of the workers. Some of the most frequently-used questions types are:

- Text – A single line of text that allows to attach additional information when needed;
- Single Choice – Inspectors can select one of the available predefined answers from a picklist. It saves time and brings more concise data to reporting;
- Multiple Choices – Same as Single Choice questions but users can select multiple answers if necessary;
- Tagged Image – Allows to add pictures to questionnaires and mark the image with tags to immediately locate an issue or better visualize the inspected equipment;
- Image Recognition – AI helps inspectors to recognize a piece of equipment faster and eliminate the time-consuming search process;

You can find more about the Resco Inspections' question types [at wiki's page](#).

Smart business logic

Customization of questionnaires is available not only to developers and system admins. [Smart Questions](#) make the process of configuring essential business logic much faster and technically less challenging – even for managers or inspectors. Users can easily set conditions like visibility, requirement, and several others directly from the question. You can learn more about [Smart Questions in one of our previous blogs](#).

Other customization options

The Questionnaire Designer offers thousands of customization options and combinations. For example, companies can add their logo and brand the reports they send to customers, change questionnaires styles, or score the answers. More details on customization functionality are available on our [Wiki support page](#).



How to develop preventive/predictive maintenance in the company?

Proactive maintenance measures prove to be cost-saving and efficient procedures for countless companies. With the [right knowledge](#) and tools, it offers an effective way of improving resource management and prevents unexpected site downtime.

With Resco Inspections and ready-to-use Equipment Maintenance Checklist, you can start regular inspections instantly. The template can also serve as a foundation for further customization and personalization for your specific use case.

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