

Asset Standardization Guide for CMMS

Stop Fighting Duplicates, Messy Hierarchies, and Inconsistent Data

AssetStage

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The Real Cost of Naming Chaos

Before we get into solutions, let's quantify the problem.

The Math Nobody Does

Scenario: PM optimization project across 5,000 pumps

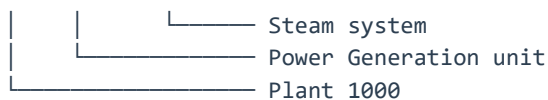
Situation	Time Required	Cost @ £75/hr
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With standardization

Filter by pump type	5 minutes	-
Apply PM template	30 minutes	-
Review and adjust	4 hours	-
Total	~5 hours	£375

Without standardization

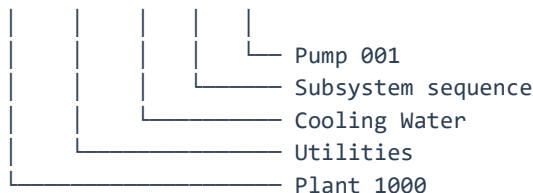
Export to Excel	30 minutes	-
Manually classify 47 naming variations	40 hours	-
Build lookup table	8 hours	-
Verify classifications	16 hours	-
Apply PM templates one-by-one	24 hours	-
Total	~90 hours	£6,750



Structure 3: Hybrid (SAP Style)

[PLANT]-[FUNCTIONAL_LOC]-[EQUIPMENT]

Example: 1000-UTIL-CW-010-PP001



Key rule: Pick ONE structure. Document it. Enforce it everywhere.

Equipment Type Codes (Complete Reference)

Use these codes in your asset names and class fields.

Rotating Equipment

Code	Equipment Type	Alt Codes	Notes
PP	Pump	PU, P	Use subtype suffix if needed (PP-CF, PP-RCP)
PP-CF	Pump, Centrifugal		Horizontal and vertical
PP-RCP	Pump, Reciprocating		Plunger, piston, diaphragm
PP-ROT	Pump, Rotary		Gear, screw, lobe, vane
PP-SUB	Pump, Submersible		
CP	Compressor	CO, C	
CP-CF	Compressor, Centrifugal		
CP-RCP	Compressor, Reciprocating		
CP-SCR	Compressor, Screw		
MO	Motor, Electric	EM, M	
MO-AC	Motor, AC		Induction, synchronous
MO-DC	Motor, DC		
GB	Gearbox	GR	

Code	Equipment Type	Alt Codes	Notes
FN	Fan	FA	Axial, centrifugal
BL	Blower	BW	
TB	Turbine	TU	Gas, steam, hydro
TB-GAS	Turbine, Gas	GT	
TB-STM	Turbine, Steam	ST	
GN	Generator	GE	
AG	Agitator/Mixer	MX	

Static Equipment

Code	Equipment Type	Alt Codes	Notes
VE	Vessel, Pressure	PV	
TK	Tank	TA	Atmospheric storage
TK-ATM	Tank, Atmospheric		
TK-PRES	Tank, Pressurized		
CL	Column/Tower	TW	Distillation, absorption
HX	Heat Exchanger	HE	
HX-ST	Heat Exchanger, Shell & Tube		
HX-PL	Heat Exchanger, Plate		
HX-AC	Heat Exchanger, Air Cooled		Fin-fan
FT	Filter	FL	
ST	Strainer	SR	
DR	Dryer	DY	
EJ	Ejector		Steam jet
SP	Separator	SE	

Valves

Code	Equipment Type	Alt Codes	Notes
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Code	Equipment Type	Alt Codes	Notes
VV	Valve (generic)	VA, V	Avoid - use specific type
VV-GT	Valve, Gate		
VV-GL	Valve, Globe		
VV-BL	Valve, Ball		
VV-BF	Valve, Butterfly		
VV-CK	Valve, Check		Swing, lift, dual plate
VV-CV	Valve, Control	CV	Includes actuator/positioner
VV-SV	Valve, Safety/Relief	SV, RV, PSV	
VV-SD	Valve, Shutdown	SDV	ESD/PSD valves
VV-BV	Valve, Blowdown		
VV-DV	Valve, Drain		

Piping & Structures

Code	Equipment Type	Alt Codes	Notes
PI	Piping	PL	Line number, not equipment
FL	Flange		Track only if critical
SP	Spool Piece		
EX	Expansion Joint		Bellows, slip
ST	Structure		Pipe racks, platforms

Electrical

Code	Equipment Type	Alt Codes	Notes
TR	Transformer	TX, XF	Power, instrument
SW	Switchgear	SG	MV, LV
CB	Circuit Breaker		Often part of switchgear
MC	Motor Control Center	MCC	
VF	Variable Frequency Drive	VFD, VSD	

Code	Equipment Type	Alt Codes	Notes
UP	UPS		
BT	Battery	BA	
CH	Charger, Battery	BC	
CA	Cable		Usually not tracked individually
PD	Panel, Distribution	DB	
LT	Lighting		
GR	Grounding		

Instrumentation

Code	Equipment Type	Alt Codes	Notes
FT	Flow Transmitter		
PT	Pressure Transmitter		
TT	Temperature Transmitter		
LT	Level Transmitter		
AT	Analyzer/Analyzer Transmitter		
FE	Flow Element		Orifice, venturi
TE	Temperature Element		RTD, thermocouple
PE	Pressure Element		Gauge
FI	Flow Indicator		Local
PI	Pressure Indicator		Local gauge
TI	Temperature Indicator		Local
LI	Level Indicator		Sight glass
FC	Flow Controller		
PC	Pressure Controller		
TC	Temperature Controller		
LC	Level Controller		
PLC	Programmable Logic Controller		

Code	Equipment Type	Alt Codes	Notes
DCS	Distributed Control System		

Material Handling

Code	Equipment Type	Alt Codes	Notes
CV	Conveyor	CN	Belt, screw, chain
CR	Crane		Overhead, mobile, jib
HO	Hoist		Chain, wire rope
EL	Elevator/Lift		Personnel, freight
FO	Forklift		Usually not in CMMS
LD	Loader		

HVAC

Code	Equipment Type	Alt Codes	Notes
AH	Air Handling Unit	AHU	
AC	Air Conditioner		Package, split
CH	Chiller		
CT	Cooling Tower		
BL	Boiler		Steam, hot water
DH	Dehumidifier		
HU	Humidifier		
EF	Exhaust Fan		
DU	Ductwork		Usually not tracked

Asset Descriptions: Good vs Bad

The description field should be STANDARDIZED and SEARCHABLE.

Description Formula

[Equipment Type], [Configuration/Subtype], [Key Spec]

Examples:

- Centrifugal Pump, Horizontal, 50HP
- Electric Motor, TEFC, 37kW
- Control Valve, Globe, 4" 300#
- Heat Exchanger, Shell & Tube, 500kW
- Transformer, Dry Type, 1000kVA

Before & After Examples

BAD (Don't Use)	GOOD (Use This)	Why
Pump	Centrifugal Pump, Horizontal, 50HP	Specific, searchable
P-101	Centrifugal Pump, Horizontal, 50HP	Tag ≠ description
Grundfos Pump	Centrifugal Pump, Horizontal, 50HP	Manufacturer goes in MFR field
Cooling Water Pump	Centrifugal Pump, Horizontal, 50HP	System goes in hierarchy
Main Pump	Centrifugal Pump, Horizontal, 50HP	"Main" is meaningless
Pump 1	Centrifugal Pump, Horizontal, 50HP	Sequence in tag, not description
Motor	Electric Motor, TEFC, 37kW	Specify type and rating
37kW Motor	Electric Motor, TEFC, 37kW	Format consistently
WEG Motor	Electric Motor, TEFC, 37kW	Manufacturer in MFR field
Pump Motor	Electric Motor, TEFC, 37kW	Driven equipment in

BAD (Don't Use)	GOOD (Use This)	Why
		relationships
Big Valve	Ball Valve, Full Port, 6" 150#	Specify type, size, class
V-2301	Gate Valve, 8" 300#, CS	Tag ≠ description
Control Valve	Control Valve, Globe, 3", Equal %	Include size and characteristic

Attribute Templates by Equipment Class

Every equipment class needs a template defining:

- Required attributes (must fill)
- Optional attributes (fill if known)
- Format/allowed values
- Examples

Template: Centrifugal Pump

Attribute	Required	Format	Allowed Values	Example
Asset ID	Yes	[SITE]-[SYS]-PP-[###]	Per naming convention	PLT1-CW-PP-001
Description	Yes	[Type] Pump, [Config], [Power]	Standardized format	Centrifugal Pump, Horizontal, 50HP
Equipment Class	Yes	ISO 14224 or internal code	1.1, PP-CF, PUMP-CENT	1.1
Manufacturer	Yes	Dropdown	Approved vendor list	Grundfos
Model Number	Yes	Free text	-	CR 32-2-2

Attribute	Required	Format	Allowed Values	Example
Serial Number	Yes	Free text	-	2024-ABC-12345
Criticality	Yes	Dropdown	A, B, C	B
Safety Class	Yes	Dropdown	Safety-Critical, Non-Safety	Non-Safety
Installation Date	Yes	YYYY-MM-DD	Valid date	2019-03-15
Design Flow Rate	Yes	Number + unit	m ³ /h, GPM	150 m ³ /h
Design Head	Yes	Number + unit	m, ft, bar	45 m
Design Pressure	Yes	Number + unit	bar, psi	10 bar
Motor Power	Yes	Number + unit	kW, HP	37 kW
RPM	Yes	Number	-	2950
Impeller Diameter	Opt	Number + unit	mm, in	215 mm
Seal Type	Yes	Dropdown	Single Mech, Double Mech, Packed	Mechanical - Double
API Plan	Opt	Dropdown	Plan 11, 13, 21, 23, 32, 52, 53A, 53B, 54	Plan 53B
Material - Casing	Opt	Dropdown	Cast Iron, CS, SS316, Duplex, Super Duplex	Cast Iron
Material - Impeller	Opt	Dropdown	Bronze, SS316, Duplex, Super Duplex	SS316
Coupling Type	Opt	Dropdown	Flexible, Spacer, Direct	Flexible
Parent Location	Yes	Location ID	Valid FLOC	PLT1-UTIL-CW
Driven By	Opt	Asset ID	Motor asset ID	PLT1-CW-MO-001

Template: Electric Motor

Attribute	Required	Format	Allowed Values	Example
Asset ID	Yes	[SITE]-[SYS]-MO-[###]	Per naming convention	PLT1-CW-MO-001
Description	Yes	Electric Motor, [Enclosure], [Power]	Standardized format	Electric Motor, TEFC, 37kW
Equipment Class	Yes	Code	3.3, MO, MOTOR-ELEC	3.3
Manufacturer	Yes	Dropdown	Approved vendor list	WEG
Model Number	Yes	Free text	-	W22 315S/M
Serial Number	Yes	Free text	-	BR-2024-78901
Criticality	Yes	Dropdown	A, B, C	B
Frame Size	Yes	Text	NEMA or IEC frame	315S/M
Power Rating	Yes	Number + unit	kW, HP	37 kW
Voltage	Yes	Number + unit	V	400V
Full Load Amps	Yes	Number	A	68
RPM	Yes	Number	-	2960
Phases	Yes	Dropdown	1, 3	3
Frequency	Yes	Dropdown	50Hz, 60Hz	50Hz
Enclosure Type	Yes	Dropdown	ODP, TEFC, TENV, XP	TEFC
Insulation Class	Yes	Dropdown	B, F, H	F
Service Factor	Opt	Number	-	1.15
Efficiency Class	Opt	Dropdown	IE1, IE2, IE3, IE4	IE3
Bearing DE	Opt	Text	Part number	6316-2Z
Bearing NDE	Opt	Text	Part number	6314-2Z
Parent Location	Yes	Location ID	Valid FLOC	PLT1-UTIL-CW

Attribute	Required	Format	Allowed Values	Example
Drives	Opt	Asset ID	Driven asset ID	PLT1-CW-PP-001

Template: Control Valve

Attribute	Required	Format	Allowed Values	Example
Asset ID	Yes	[SITE]-[SYS]-CV-[###]	Per naming convention	PLT1-CW-CV-001
Description	Yes	Control Valve, [Body Type], [Size] [Rating]	Format	Control Valve, Globe, 4" 300#
Equipment Class	Yes	Code	8.6, VV-CV, VALVE-CTRL	8.6
Manufacturer	Yes	Dropdown	Approved vendor list	Fisher
Model Number	Yes	Free text	-	ED 4" 300#
Serial Number	Yes	Free text	-	FI-2024-12345
Criticality	Yes	Dropdown	A, B, C	A
Size	Yes	Text	Nominal size	4"
Pressure Rating	Yes	Dropdown	150#, 300#, 600#, 900#, 1500#, 2500#	300#
Body Type	Yes	Dropdown	Globe, Angle, Ball, Butterfly	Globe
Cv	Yes	Number	-	150
Characteristic	Yes	Dropdown	Linear, Equal %, Quick Opening	Equal %
Material - Body	Yes	Dropdown	CS, SS316, Alloy 20, etc.	WCB
Material - Trim	Opt	Dropdown	SS316, SS317, Stellite, etc.	SS316
Actuator Type	Yes	Dropdown	Pneumatic, Electric, Hydraulic	Pneumatic - Diaphragm
Actuator Size	Opt	Number	-	40
Air Fail Action	Yes	Dropdown	Fail Open, Fail Close, Fail Last	Fail Close

Attribute	Required	Format	Allowed Values	Example
Positioner	Yes	Y/N	-	Y
Positioner Model	Opt	Text	-	DVC6200
SIS Classification	Opt	Dropdown	SIL 1, SIL 2, SIL 3, Non-SIS	Non-SIS
Parent Location	Yes	Location ID	Valid FLOC	PLT1-UTIL-CW

Template: Heat Exchanger

Attribute	Required	Format	Allowed Values	Example
Asset ID	Yes	[SITE]-[SYS]-HX-[###]	Per naming convention	PLT1-COOL-HX-001
Description	Yes	Heat Exchanger, [Type], [Duty]	Format	Heat Exchanger, Shell & Tube, 500kW
Equipment Class	Yes	Code	5.1, HX-ST	5.1
Manufacturer	Yes	Dropdown	Approved vendor list	Alfa Laval
Model Number	Yes	Free text	-	M10-BFG
Serial Number	Yes	Free text	-	AL-2024-45678
Criticality	Yes	Dropdown	A, B, C	B
Type	Yes	Dropdown	Shell & Tube, Plate, Air Cooled, Double Pipe	Shell & Tube
Duty	Yes	Number + unit	kW, BTU/hr	500 kW
Surface Area	Yes	Number + unit	m ² , ft ²	50 m ²
Design Pressure - Shell	Yes	Number + unit	bar, psi	10 bar
Design Pressure - Tube	Yes	Number + unit	bar, psi	16 bar
Design Temp - Shell	Yes	Number + unit	°C, °F	150°C

Attribute	Required	Format	Allowed Values	Example
Design Temp - Tube	Yes	Number + unit	°C, °F	200°C
Material - Shell	Yes	Dropdown	CS, SS304, SS316, Titanium	CS
Material - Tubes	Yes	Dropdown	CS, SS304, SS316, Cu-Ni, Titanium	SS316
TEMA Type	Opt	Text	-	AES
Number of Tubes	Opt	Number	-	200
Tube Length	Opt	Number + unit	m, ft	3 m
Number of Passes - Shell	Opt	Number	-	1
Number of Passes - Tube	Opt	Number	-	2
Parent Location	Yes	Location ID	Valid FLOC	PLT1-COOL

Hierarchy Design Patterns

Choose a pattern that fits your industry and CMMS.

Pattern 1: Location-First (Facilities/Commercial)

```

Enterprise
├── Site (Campus/Building)
│   ├── Area (Floor/Zone)
│   │   ├── System (HVAC, Electrical, Plumbing)
│   │   │   ├── Equipment
│   │   │   └── Component

```

Example:

```

ACME Corp
├── HQ Building
│   ├── Floor 3
│   │   ├── HVAC System
│   │   │   ├── AHU-3-01
│   │   │   │   ├── Supply Fan
│   │   │   │   ├── Cooling Coil
│   │   │   │   └── Filter Bank

```

Best for: Commercial buildings, campuses, facilities management

Pattern 2: Process-First (Manufacturing/Process)

```

Enterprise
├── Site (Plant)
│   ├── Process Unit
│   │   ├── System
│   │   │   ├── Subsystem
│   │   │   │   ├── Equipment
│   │   │   │   │   └── Component

```

Example:

```

ACME Chemicals
├── Plant 1
│   ├── Distillation Unit 100
│   │   ├── Feed System
│   │   │   ├── Feed Preheat
│   │   │   │   ├── E-101 Feed/Effluent Exchanger
│   │   │   │   │   ├── Tube Bundle
│   │   │   │   │   └── Channel Head

```

Best for: Refineries, chemical plants, process industries

Pattern 3: ISO 14224 Full (Oil & Gas)

```

Industry
├── Business Category
│   ├── Installation
│   │   ├── Plant/Unit
│   │   │   ├── Section
│   │   │   │   ├── Equipment Unit
│   │   │   │   │   ├── Subunit
│   │   │   │   │   │   ├── Maintainable Item
│   │   │   │   │   │   └── Part

```

Example:

```

Petroleum
├── Upstream - Offshore
│   ├── Platform Alpha
│   │   ├── Water Injection
│   │   │   ├── Seawater Lift
│   │   │   │   ├── P-4501A Seawater Lift Pump
│   │   │   │   │   ├── Pump Assembly
│   │   │   │   │   │   ├── Mechanical Seal
│   │   │   │   │   │   └── O-Ring

```

Best for: Oil & gas when benchmarking with OREDA data

Pattern 4: Hybrid (Common Compromise)

```

Site
├── Area
│   ├── Functional Location (System + Tag)
│   │   ├── Equipment
│   │   │   └── Component

```

Example:

Plant 1

```
└─ Utilities
    └─ 1-UTIL-CW-010 (Cooling Water Pump Station)
        └─ PP-001 Cooling Water Pump A
            └─ Mechanical Seal
            └─ Coupling
        └─ MO-001 Pump A Motor
        └─ PP-002 Cooling Water Pump B
        └─ MO-002 Pump B Motor
```

Best for: Most industrial sites, especially SAP PM users

The Standardization Crosswalk

Before you can standardize, you need to MAP your chaos.

Step 1: Export and Count Variations

-- Find all unique values in asset type/class field

```
SELECT asset_type, COUNT(*) as count
```

```
FROM assets
```

```
GROUP BY asset_type
```

```
ORDER BY count DESC;
```

Step 2: Build Your Crosswalk Table

Current Value	Standard Value	Count	Action	Notes
Pump	PP - Pump	234	AUTO-MAP	Generic - may need review
PUMP	PP - Pump	89	AUTO-MAP	Case variation
Centrifugal Pump	PP-CF - Pump, Centrifugal	156	AUTO-MAP	Good
Cent. Pump	PP-CF - Pump, Centrifugal	23	AUTO-MAP	Abbreviation
Centrif Pump	PP-CF - Pump, Centrifugal	12	AUTO-MAP	Abbreviation
CP	PP-CF - Pump, Centrifugal	45	VERIFY	Confirm these are centrifugal

Current Value	Standard Value	Count	Action	Notes
Pump, Centrifugal	PP-CF - Pump, Centrifugal	8	AUTO-MAP	Format variation
Pump - Centrifugal	PP-CF - Pump, Centrifugal	5	AUTO-MAP	Format variation
Grundfos Pump	PP-CF - Pump, Centrifugal	67	AUTO-MAP	Move MFR to correct field
Process Pump	MANUAL REVIEW	34	REVIEW	Need to verify pump type
Transfer Pump	MANUAL REVIEW	28	REVIEW	Need to verify pump type
CW Pump	PP-CF - Pump, Centrifugal	45	AUTO-MAP	Confirm system from hierarchy
Submersible Pump	PP-SUB - Pump, Submersible	12	AUTO-MAP	Different type
Sump Pump	PP-SUB - Pump, Submersible	8	VERIFY	May be centrifugal or submersible
P-101	MANUAL REVIEW	1	REVIEW	Tag number, not type

Step 3: Apply Transformations

-- Example update query (test in staging first!)

UPDATE assets

SET asset_type_standard = 'PP-CF'

WHERE asset_type **IN** ('Centrifugal Pump', 'Cent. Pump', 'Centrif Pump', 'Pump, Centrifugal', 'Pump - Centrifugal');

Blank Crosswalk Template

Current Value Standard Value Count Action Notes

Data Quality Governance

RACI Matrix

Activity	Data Owner	CMMS Admin	Reliability Eng	Maintenance Sup	Technician
Define naming convention	A	R	C	C	I
Approve new equipment classes	A	R	C	I	I
Create new asset records	I	C	I	R	R
Modify asset hierarchy	A	R	C	I	I
Add new failure codes	C	R	A	C	I
Review data quality	A	R	C	I	I

Activity	Data Owner	CMMS Admin	Reliability Eng	Maintenance Sup	Technician
KPIs					
Delete/merge duplicate assets	A	R	C	C	I
Approve vendor master additions	A	R	I	C	I

A = Accountable (decision maker) **R** = Responsible (does the work) **C** = Consulted (input required) **I** = Informed (kept in loop)

Change Request Workflow

1. REQUEST

- └ Requestor submits change request form
 - What: Describe the change
 - Why: Business justification
 - Impact: Affected assets/processes

2. ANALYSIS

- └ CMMS Admin performs impact analysis
 - How many assets affected?
 - What reports/integrations impacted?
 - Reversibility?

3. REVIEW

- └ Data Owner reviews and approves/rejects
 - Aligns with standards?
 - Worth the effort?
 - Timing appropriate?

4. IMPLEMENT

- └ CMMS Admin implements change
 - In test environment first
 - Document changes made
 - Update related documentation

5. VERIFY

- └ Requestor verifies change
 - Meets requirements?
 - No unintended consequences?

6. COMMUNICATE

- └─ Notify affected users
 - What changed
 - When effective
 - What to do differently

Data Quality KPIs Dashboard

Track these metrics monthly.

Completeness Metrics

KPI	Formula	Target	Your Current
Assets with manufacturer	$\text{Assets with MFR} \div \text{Total Assets} \times 100$	>90%	____%
Assets with model number	$\text{Assets with Model} \div \text{Total Assets} \times 100$	>85%	____%
Assets with serial number	$\text{Assets with S/N} \div \text{Total Assets} \times 100$	>80%	____%
Assets with criticality	$\text{Assets with Criticality} \div \text{Total Assets} \times 100$	100%	____%
Assets with install date	$\text{Assets with Date} \div \text{Total Assets} \times 100$	>90%	____%
Assets with parent location	$\text{Assets with Parent} \div \text{Total Assets} \times 100$	100%	____%

Consistency Metrics

KPI	Formula	Target	Your Current
Naming convention compliance	$\text{Compliant Names} \div \text{Total Assets} \times 100$	>95%	____%
Equipment class assigned	$\text{Assets with Class} \div \text{Total Assets} \times 100$	100%	____%

KPI	Formula	Target	Your Current
Valid equipment class	$\frac{\text{Assets with Valid Class}}{\text{Assets with Class}} \times 100$	100%	____%
Duplicate asset rate	$\frac{\text{Duplicate Assets}}{\text{Total Assets}} \times 100$	<2%	____%
Orphan assets (no parent)	$\frac{\text{Orphans}}{\text{Total Assets}} \times 100$	0%	____%

Description Quality

KPI	Formula	Target	Your Current
Avg description length	$\frac{\text{Sum of char lengths}}{\text{Total Assets}}$	>25 chars	____ chars
Descriptions >10 chars	$\frac{\text{Long descriptions}}{\text{Total}} \times 100$	>95%	____%
Unique descriptions	$\frac{\text{Unique}}{\text{Total}} \times 100$	>80%	____%

Audit Queries

Find assets missing manufacturer:

```
SELECT assetnum, description, location
FROM asset
WHERE (manufacturer IS NULL OR manufacturer = '')
AND status = 'OPERATING'
ORDER BY location;
```

Find duplicate descriptions:

```
SELECT description, COUNT(*) as count
FROM asset
WHERE status = 'OPERATING'
GROUP BY description
HAVING COUNT(*) > 3
ORDER BY count DESC;
```

Find naming convention violations:

```
-- Adjust pattern to match your convention
SELECT assetnum, description
FROM asset
```

```
WHERE assetnum NOT REGEXP '^[A-Z]{3,5}-[A-Z]{2,4}-[A-Z]{2}-[0-9]{3}$'  
AND status = 'OPERATING';
```

Find orphan assets:

```
SELECT a.assetnum, a.description  
FROM asset a  
LEFT JOIN locations l ON a.location = l.location  
WHERE l.location IS NULL  
AND a.status = 'OPERATING';
```

Find equipment class variations:

```
SELECT  
  UPPER(TRIM(equipment_class)) as normalized_class,  
  COUNT(*) as count,  
  GROUP_CONCAT(DISTINCT equipment_class) as variations  
FROM asset  
GROUP BY UPPER(TRIM(equipment_class))  
HAVING COUNT(DISTINCT equipment_class) > 1  
ORDER BY count DESC;
```

90-Day Implementation Roadmap

Days 1-30: Assess & Define

Week 1: Data Discovery

- ☐ Export complete asset register to Excel
- ☐ Count unique values in: asset type, class, manufacturer, description
- ☐ Identify top 20 equipment classes by count
- ☐ Document current naming patterns (or lack thereof)
- ☐ Count duplicates (same serial number, same location+type)

Week 2: Gap Analysis

- ☐ Choose target standard (ISO 14224, KKS, or custom)
- ☐ Compare current classes to target classes
- ☐ Identify required attributes per class (from templates above)
- ☐ Calculate completeness % for each required attribute
- ☐ Prioritize gaps by impact and effort

Week 3: Standards Definition

- ☐ Draft naming convention document
- ☐ Draft equipment class list with definitions
- ☐ Draft attribute templates for top 10 equipment classes
- ☐ Draft description format rules
- ☐ Create good/bad examples

Week 4: Stakeholder Alignment

- ☐ Present standards to maintenance leadership
- ☐ Present to reliability engineering
- ☐ Present to CMMS administrators
- ☐ Incorporate feedback
- ☐ Get formal sign-off

Days 31-60: Build & Map

Week 5-6: Crosswalk Development

- ☐ Build crosswalk for asset type/class variations
- ☐ Build crosswalk for manufacturer name variations
- ☐ Build crosswalk for description standardization
- ☐ Build crosswalk for location hierarchy mapping
- ☐ Identify records requiring manual review

Week 7: Staging Environment

- ☐ Set up staging environment (AssetStage or test CMMS)
- ☐ Configure validation rules
- ☐ Load asset data into staging
- ☐ Run automated transformations
- ☐ Generate exception reports

Week 8: Pilot & Refine

- ☐ Select pilot area (500-1000 assets)

- ☐ Apply all transformations to pilot
- ☐ Review results with SMEs
- ☐ Adjust crosswalks based on findings
- ☐ Document lessons learned

Days 61-90: Implement & Enforce

Week 9-10: Full Transformation

- ☐ Apply transformations to remaining assets
- ☐ Complete manual review items
- ☐ Validate parent-child relationships
- ☐ Verify no orphan assets
- ☐ Run full data quality report

Week 11: Go-Live

- ☐ Load standardized data to production CMMS
- ☐ Verify data integrity post-load
- ☐ Configure CMMS validation rules (dropdowns, required fields)
- ☐ Update user documentation
- ☐ Train users on new standards

Week 12: Sustain

- ☐ Set up data quality dashboard
 - ☐ Schedule monthly data quality reviews
 - ☐ Establish change request process
 - ☐ Assign data stewards per area
 - ☐ Plan quarterly standards review
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Quick Reference Card

Naming Convention

[SITE] - [AREA] - [SYSTEM] - [TYPE] - [SEQ]

Example: PLT1-UTIL-CW-PP-001

Top Equipment Codes

Code	Type	Code	Type
PP	Pump	VV	Valve
MO	Motor	HX	Heat Exchanger
CP	Compressor	TK	Tank
GB	Gearbox	VE	Vessel
FN	Fan	TR	Transformer
BL	Blower	SW	Switchgear

Description Format

[Equipment Type], [Configuration], [Key Spec]

Example: Centrifugal Pump, Horizontal, 50HP

Required Attributes (All Classes)

- Manufacturer
- Model Number
- Serial Number
- Criticality (A/B/C)
- Installation Date
- Parent Location

Data Quality Contacts

- Data Owner: _____
- CMMS Admin: _____
- Questions: _____

Self-Assessment: Are You Ready?

Score yourself 0-2 on each item (0=No, 1=Partial, 2=Yes)

Item	Score
We have a documented naming convention	/2
The naming convention is enforced in CMMS	/2
We have defined equipment classes	/2
Equipment classes are consistently applied	/2
We have attribute templates per class	/2
Required attributes are enforced	/2
We have a data quality owner	/2
We measure data quality KPIs	/2
We have a change control process	/2
We review data quality monthly	/2
TOTAL	/20

Scoring:

- 16-20: Excellent - focus on continuous improvement
- 11-15: Good foundation - close the gaps
- 6-10: Significant work needed - start with standards
- 0-5: Major overhaul required - get help

Need help standardizing your asset data? AssetStage provides data staging, validation, and clean import to any CMMS platform. Contact us at sales@assetstage.io

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