# Bearings, Lubrication and Alignment Measurement and Evidence Workbook - Loss of Output or Performance

Bearings, Lubrication and Alignment | Loss of Output or Performance | Asset ID FIX-14-04-03

**Safety gate: Stop, isolate and verify before exposure to hazardous energy. Lockout/Tagout and live testing require the applicable site procedure, authorised controls and a qualified person. Never bypass a guard, interlock or protective device to complete this workbook.**

## How to use this field resource

This is an equipment-agnostic documentation workbook for bearings, lubrication and alignment. It helps a trained team document lubricant, temperature, vibration, load and alignment history before disassembly. It does not identify a fault by itself and does not replace the equipment-specific OEM manual, drawings, limits, permits or a qualified technician's judgement.

| Intake field | Record |
|---|---|
| Asset or equipment ID | _____ |
| Site and location | _____ |
| Reported by / time | _____ |
| Fault situation | Loss of Output or Performance |
| Operating state | Stopped / standby / starting / running / loaded |
| Safety owner | _____ |
| OEM reference used | Document number and revision: _____ |

## Evidence areas for this system

For a loss of output or performance, focus on evidence that can be dated, repeated and handed to another technician. Capture the as-found state before clearing alarms, changing settings or disturbing connections.

| # | Evidence area | First record |
|---|---|---|
| 1 | Bearing location and duty | As-found note: _____ |
| 2 | Lubricant type and service record | As-found note: _____ |
| 3 | Temperature trend | As-found note: _____ |
| 4 | Vibration or sound observation | As-found note: _____ |
| 5 | Alignment history | As-found note: _____ |
| 6 | Contamination indicators | As-found note: _____ |

## Measurement and Evidence Workbook

Use this section to compare expected capacity with the actual result under a recorded load. Record baseline, demand, output and limiting indication before choosing the next action.

| Evidence area | Source | Result | Expected state | Meaning |
|---|---|---|---|---|
| Bearing location and duty | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |
| Lubricant type and service record | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |
| Temperature trend | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |
| Vibration or sound observation | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |
| Alignment history | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |
| Contamination indicators | Source: _____ | As found: _____ | Reference: _____ | Supports / rules out |

### Evidence quality check

- Can another technician identify the source and time?
- Was the equipment state recorded with the value?
- Is the reference current for this exact equipment?
- Was the instrument suitable and in calibration?
- Does the evidence distinguish between two hypotheses?

## Bearings, Lubrication and Alignment Evidence Map

**Evidence first: Preserve alarms, event history, settings, trends and the as-found physical state before reset, disconnection or adjustment. If safe access is uncertain, stop and refer the task to the authorised person.**

| # | System area | Evidence action | Trace | Record |
|---|---|---|---|---|
| 1 | Bearing location and duty | Observe and identify | Evidence ID: _____ | Finding: _____ |
| 2 | Lubricant type and service record | Record source and time | Evidence ID: _____ | Finding: _____ |
| 3 | Temperature trend | Compare with reference | Evidence ID: _____ | Finding: _____ |
| 4 | Vibration or sound observation | State what it supports | Evidence ID: _____ | Finding: _____ |
| 5 | Alignment history | State what it rules out | Evidence ID: _____ | Finding: _____ |
| 6 | Contamination indicators | Choose the least invasive next check | Evidence ID: _____ | Finding: _____ |

## Scenario boundary

For this loss of output or performance, confirm the complaint with comparable conditions before escalating the repair. Write the boundary before testing so urgency does not quietly change the rules.

| Boundary | Definition |
|---|---|
| Known good condition | _____ |
| Known failed condition | _____ |
| Difference between them | _____ |
| First missing evidence | _____ |
| Stop-work threshold | _____ |
| Escalation owner | _____ |

### Evidence labels

- FACT - directly observed and traceable.
- REPORT - supplied by another person; source recorded.
- INFERENCE - reasonable explanation that still needs a test.
- UNKNOWN - important gap that must not be filled by assumption.
- LIMIT - OEM, engineering or site acceptance value.

## Loss of Output or Performance Condition Workbook

The goal is to compare expected capacity with the actual result under a recorded load. Describe the failed state narrowly enough that another trained person could look for the same thing without being told your suspected cause.

| Question | Boundary prompt | Record |
|---|---|---|
| What changed? | Function, output, indication or behaviour | _____ |
| Where? | Asset, side, circuit, zone or process stage | _____ |
| When? | Sequence step, runtime, load or environment | _____ |
| How often? | Every cycle, random, once, or after delay | _____ |
| What restores it? | Nothing, time, reset, cooling or load change | _____ |
| What stays normal? | Unaffected systems or functions | _____ |
| What changed recently? | Work, software, settings, parts or operating duty | _____ |

## Controlled reproduction plan

| Plan field | Record |
|---|---|
| Safe starting state | _____ |
| One condition to vary | _____ |
| Conditions held constant | _____ |
| Evidence captured | Baseline, demand, output and limiting indication |
| Maximum attempts | _____ |
| Immediate stop signal | _____ |
| Authorising person | _____ |

### Attempt notes

| Attempt | Starting condition | Result | Decision |
|---|---|---|---|
| 1 | State: _____ | Observed: _____ | Next decision: _____ |
| 2 | State: _____ | Observed: _____ | Next decision: _____ |
| 3 | State: _____ | Observed: _____ | Next decision: _____ |
| 4 | State: _____ | Observed: _____ | Next decision: _____ |

## Measurement and Evidence Register

**Measurement boundary: This page records an approved test; it does not authorise one. A qualified person must choose the method, instrument category, connection points, isolation state and protective controls from the applicable procedure.**

| ID | Evidence area | Traceable source | Result | When |
|---|---|---|---|---|
| 1 | Bearing location and duty | Method / source: _____ | Value / state: _____ | Time: _____ |
| 2 | Lubricant type and service record | Method / source: _____ | Value / state: _____ | Time: _____ |
| 3 | Temperature trend | Method / source: _____ | Value / state: _____ | Time: _____ |
| 4 | Vibration or sound observation | Method / source: _____ | Value / state: _____ | Time: _____ |
| 5 | Alignment history | Method / source: _____ | Value / state: _____ | Time: _____ |
| 6 | Contamination indicators | Method / source: _____ | Value / state: _____ | Time: _____ |

## Instrument and reference record

| Control | Record |
|---|---|
| Instrument or data source | _____ |
| Identifier and range | _____ |
| Calibration / validation status | _____ |
| OEM or engineering reference | Document and revision: _____ |
| Equipment operating state | _____ |
| Uncertainty or limitation | _____ |

### Before using a value

- Check units, scale, timestamp and source identity.
- Keep raw evidence where practical; do not retain only a conclusion.
- Record values that disagree with the current theory.
- Compare only like operating conditions.
- Treat a single normal reading as one data point, not proof that an intermittent fault is absent.

## Cause and Evidence Matrix

List competing explanations before the team settles on one. A good next check separates hypotheses; a poor check produces the same answer no matter which cause is true.

| # | Hypothesis | Supporting | Contradicting | Discriminating check |
|---|---|---|---|---|
| 1 | Bearing location and duty hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 2 | Lubricant type and service record hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 3 | Temperature trend hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 4 | Vibration or sound observation hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 5 | Alignment history hypothesis | For: _____ | Against: _____ | Next evidence: _____ |
| 6 | Contamination indicators hypothesis | For: _____ | Against: _____ | Next evidence: _____ |

## Five-why chain with evidence

| Level | Explanation | Proof or gap |
|---|---|---|
| Problem | Loss of Output or Performance | Evidence ID: _____ |
| Why 1 | _____ | Evidence: _____ |
| Why 2 | _____ | Evidence: _____ |
| Why 3 | _____ | Evidence: _____ |
| Why 4 | _____ | Evidence: _____ |
| Why 5 | _____ | Evidence: _____ |

### Cause confidence

- Confirmed - reproduced or directly measured against a valid reference.
- Probable - best fit, but one meaningful alternative remains.
- Possible - plausible and worth a safe test.
- Unrelated - contradicted by the evidence.
- Unknown - evidence is missing or unreliable.

## Repair Decision and Return-to-Service Gate

**Release authority: Completion of a repair is not permission to energise or operate. Restore energy and return equipment to service only through the site's authorised process, with guards and protective functions reinstated.**

| Decision field | Record |
|---|---|
| Confirmed problem | _____ |
| Evidence-supported cause | _____ |
| Approved repair reference | Document and revision: _____ |
| Work completed | _____ |
| Parts / settings changed | _____ |
| Residual defect or restriction | _____ |
| Person completing / checking | _____ |

## Controlled verification

| Verification | Acceptance basis | Status |
|---|---|---|
| As-found symptom | Loss of Output or Performance | Absent / present / not tested |
| Primary function | Bearing location and duty | Pass / fail / not tested |
| Related function | Lubricant type and service record | Pass / fail / not tested |
| Protection and alarms | Normal protective state retained | Pass / fail / not tested |
| Leak, heat, noise or damage | No new adverse condition | Pass / fail / not tested |
| Recorded operating condition | Load / mode / duration: _____ | Accepted / restricted |

### Release signatures

- Technical check by: _____ Date/time: _____
- Operations acceptance by: _____ Date/time: _____
- Safety or permit close-out by: _____ Date/time: _____
- Follow-up owner and due date: _____

## Handover, Follow-Up and Prevention Plan

Close the record so the next shift can understand the loss of output or performance, the evidence, the repair decision and any remaining restriction without relying on memory.

| Handover field | Record |
|---|---|
| Current equipment state | _____ |
| What was confirmed | _____ |
| What remains unknown | _____ |
| Operating restriction | _____ |
| Evidence location | Log / work order / folder: _____ |
| Next owner and action | _____ |
| Escalation trigger | _____ |

## Follow-up schedule

| When | Review | Record |
|---|---|---|
| Next shift | Confirm state and restriction | Owner: _____ Result: _____ |
| 24 hours | Review bearing location and duty | Owner: _____ Result: _____ |
| 7 days | Check for repeat events under comparable duty | Owner: _____ Result: _____ |
| 30 days | Review effectiveness and maintenance action | Owner: _____ Result: _____ |

### Prevention decision

- Update the task, limit, drawing or training only when the cause supports it.
- Remove any temporary control by its approved expiry point.
- Share the lesson without exposing private, security-sensitive or proprietary data.
- Record whether the action reduced repeat faults, downtime or diagnostic effort.
- Reopen the analysis if the symptom returns under the same conditions.

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