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Condition monitoring and diagnostics of machines — General guidelines

Surveillance et diagnostic d'état des machines — Lignes directrices générales

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 108, *Mechanical vibration, shock and condition monitoring*, Subcommittee SC 5, *Condition monitoring and diagnostics of machine systems*.

This third edition cancels and replaces the second edition (ISO 17359:2011), which has been technically revised.

The following changes have been made:

— reference to the ISO 55000 family of asset management standards has been included;

— power transformers have been added to Annex A and Annex B;

— Annex D has been updated;

— the Bibliography has been revised.

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Introduction

This document provides guidelines for condition monitoring and diagnostics of machines using parameters such as vibration, temperature, tribology, flow rates, contamination, power, and speed typically associated with performance, condition, and quality criteria. The evaluation of machine function and condition may be based on performance, condition or product quality.

Condition monitoring forms a vital component of asset management and this document is the parent document of a group of standards which cover the field of condition monitoring and diagnostics. The range of condition monitoring standards are indispensable for the use and implementation of the ISO 55000 family of asset management standards. This document provides general procedures to be considered when setting up a condition monitoring programme for all types of machine, and includes references to other International Standards and other documents required or useful in this process.

An overview of the current status of condition monitoring International Standards is shown in Annex D.

This document presents an overview of a generic procedure recommended to be used when implementing a condition monitoring programme, and provides further detail on the key steps to be followed. It introduces the concept of directing condition monitoring activities towards identifying and detecting symptoms of root cause failure modes and describes the generic approach to setting alarm criteria, carrying out diagnosis and prognosis, and improving the confidence in diagnosis and prognosis, which are developed further in other International Standards.

Particular techniques of condition monitoring are only introduced briefly and are covered in more detail in other International Standards referenced in the Bibliography.

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Condition monitoring and diagnostics of machines — General guidelines

1 Scope

This document gives guidelines for the general procedures to be considered when setting up a condition monitoring programme for machines and includes references to associated standards required in this process. This document is applicable to all machines.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 2041, *Mechanical vibration, shock and condition monitoring — Vocabulary*

ISO 13372, *Condition monitoring and diagnostics of machines — Vocabulary*

ISO 13379-1, *Condition monitoring and diagnostics of machines — Data interpretation and diagnostics techniques — Part 1: General guidelines*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 2041, ISO 13372 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at http://www.electropedia.org/

3.1
equipment
machine or group of machines including all machine or process control components

4 Overview of condition monitoring procedure

A generic procedure which may be used when implementing a condition monitoring programme is described in Clauses 5 to 11 and shown in diagrammatic form in Figure 1. Details on the key steps to be followed are provided. Condition monitoring activities should be directed towards identifying and avoiding root cause failure modes.

Particular techniques of condition monitoring are only introduced briefly. They are covered in more detail in other International Standards referenced in Annex D and the Bibliography.

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