

# rotork®

Keeping the World Flowing  
for Future Generations

## Reliability Services Line Card Glossary





# Reliability Services

Increase the reliability of your assets with Rotork's customisable maintenance plan

|                                     | Basic<br>Health Check<br>■ □ □ | Premium<br>Enhanced Maintenance<br>■ ■ ■ | Standard<br>Planned Maintenance<br>■ ■ □ |
|-------------------------------------|--------------------------------|--|--|
| Site Survey <sup>1</sup>            | ✓                              | ✓  | ✓  |
| Asset Register                      | ✓                              | ✓  | ✓  |
| Health Check Report                 | ✓                              | ✓  | ✓  |
| Maintenance Log                     | ✓                              | ✓  | ✓  |
| Functional Test                     | ✓                              | ✓  | ✓  |
| Responsive Labour <sup>2</sup>      |                                | ✓  | ✓  |
| Performance Review                  |                                | ✓  | ✓  |
| Maintenance Record Review           |                                | ✓  | ✓  |
| Intrusive Inspection                |                                | ✓  | ✓  |
| Corrective Maintenance              |                                | ✓  | ✓  |
| Consumables <sup>3</sup>            |                                | ✓  | ✓  |
| Benchmarking of Application Data    |                                | ✓  | ✓  |
| Optimise Configuration/Set Up       |                                | ✓  | ✓  |
| Parts <sup>4</sup>                  |                                | ✓  | +  |
| iAM Report - Annually <sup>5</sup>  |                                | ✓  | +  |
| Priority Scheduling Service         |                                | ✓  |  |
| Priority Technical Support          |                                | ✓  |  |
| Customisable Spares Management      |                                | +  | +  |
| Resident Engineer (part/full time)  |                                | +  | +  |
| Valve Inspection/Maintenance        |                                | +  | +  |
| iAM Report - Quarterly <sup>6</sup> |                                | +  |  |

Contractual minimum term applies



## Site Survey<sup>1</sup>

A Rotork engineer will survey the site (or part of the site) noting down the asset's location, visual condition, etc. This is the data gathering exercise used to produce the Asset Register and Health Check Report.

## Asset Register

An easy to read file that is provided to the customer listing the assets on the site, including asset specification (type, size, type of valve, etc.) and application specific information.

## Health Check Report

A Health Check Report is given to the customer summarising the data from our non-intrusive inspection of the asset. It allows the customer to see the asset's condition, together with our engineer's comments and remarks.



## Maintenance Log

An easy to read file is provided to the customer, where we record all maintenance done on the asset. This will be updated when further maintenance is done, building up a lifetime picture of an asset's maintenance history.



## Functional Test

The basic functions of the actuator are tested (open/close etc.) The test covers manual, remote and local functions to ensure that the actuator is working correctly no matter how the input signal is delivered.



## Responsive Labour<sup>2</sup>

This is the full 'onsite' cost of a Rotork engineer to carry out in-situ repairs on assets that are easily accessible. Labour for the included activities is already included in all tiers; this covers time spent performing the repairs that have been identified. Note that the travel and time cost of getting to site for the repairs is not covered.





### Performance Review

The asset's operation and performance are assessed by running the asset. The Rotork engineer can make recommendations for maintenance and repairs based on the actuator's function and frequency of use.



### Maintenance Record Review

A Rotork engineer reviews the maintenance log to understand the asset's history. This builds up a picture of how the asset has performed through time and thus gets the best set-up for each asset.



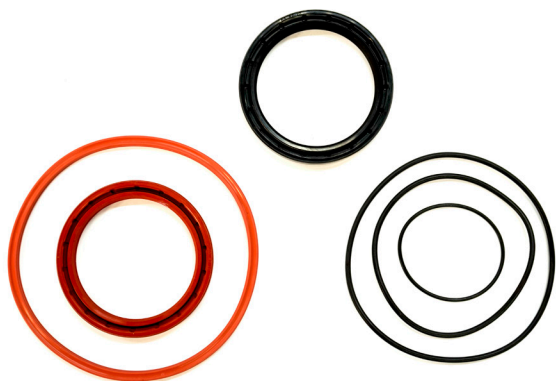
### Intrusive Inspection

A check of the asset's internal condition by a Rotork engineer. Internal maintenance can be performed as per the customer's instruction. Consumables will be checked and changed as necessary.



### Corrective Maintenance

Corrective maintenance is performed as required when an asset is being serviced inline with your agreement. The labour for this is included – the customer has the option of including parts in their service tier or paying for parts as/when required.



### Consumables<sup>3</sup>

Genuine Rotork OEM consumables include seals, O-rings, battery and oil only. These will be replaced as required by the Rotork engineer.

*(See FAQ section for more information)*



### Benchmarking of Application Data

Asset application data is benchmarked against similar Rotork actuators performing similar tasks. This allows the asset to be set up in the 'optimal' way for its type. e.g., we know that a wedge gate valve should close on torque, rather than limit – we ensure that this is the case for your asset.



## Optimise Configuration/Set Up

The asset's operation and performance are assessed by running the asset. The Rotork engineer can make recommendations for maintenance and repairs based on the actuator's function and frequency of use.



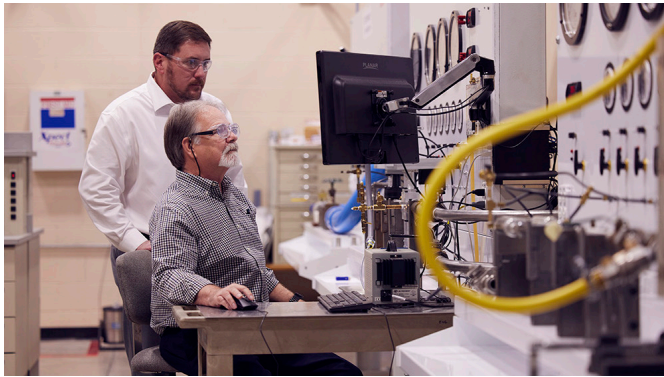
## Parts<sup>4</sup>

Genuine Rotork OEM parts include all non-consumable parts except for; motor, drive bush, centre column, worm shaft/wheel. Payment covers the cost of parts required during the service plan. If the service plan includes parts, fitting is also covered. (See FAQ section for more information)



## Priority Scheduling Service

Priority Scheduling for parts dispatch. Your order/requirement is given priority status over other orders – this will be particularly useful at busy times (e.g approaching holidays) when dispatch capacity may be constrained.



## Priority Technical Support

Priority technical support is available over the phone or in person to help with setting up assets, getting the best from your asset and helping with any problems/issues that the customer may have with their assets. (Subject to geographical restrictions)

## iAM Report Annual<sup>5</sup>

A single "Intelligent Asset Management" report per asset per year is delivered to the customer. iAM provides predictive, actionable insights for your asset.

Data for the iAM report is collected while the Rotork engineer is onsite for your annual scheduled visit.

If a part is identified in an iAM 'suggested action', Rotork will swap this out at the customer's request, with the fee for the part being passed on to the customer if they do not have 'Parts' cover under their Reliability Services plan.

Timings for any such maintenance are to be agreed upon between Rotork and the customer once the request has been made.

(Note iAM is NOT available for all actuators – check with the iAM team if you are unsure.)



# Optional Services



## Customisable Spares Management

Rotork and the customer assess the assets, their maintenance requirements and asset criticality and develop a customised programme to hold the desired level of spares cover for the site at a specified location (onsite or at a Rotork location). This ensures that the customer always has the spares that they need available when they need them.

Our offering helps customers address the challenges of knowing what and how many critical spares are needed for their assets. We also help customers manage their spares inventory and optimise spend on each actuator to effectively balance risk with budget. We understand the trade-offs between capital investment and operational spend, so our in-house team of experts will work with you to find the best solution.



## Resident Engineer (part/full time)

Rotork can arrange a fully certified Rotork engineer to be resident at your site for the duration of your contract. A schedule will be developed which can include:

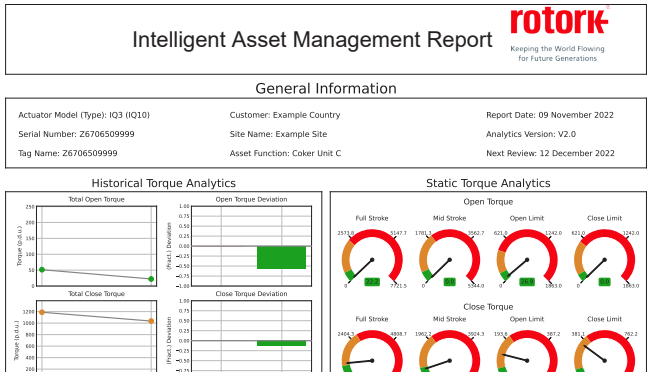
- Planned maintenance on all Rotork assets on a rolling basis
- Highlighting critical assets for iAM monitoring, or more regular maintenance
- Monthly KPI updates, e.g in an agreed Power BI format to keep you informed

A resident engineer can remove the need for the client to perform any actuator maintenance at their site and increase uptime as any faults or areas of concern can have an immediate response.



## Valve Inspection/Maintenance

A Rotork Valve Inspection includes surveying the location of the designated valves, including their location and any accessibility issues, checking their function and making sure that they are 'right-sized' for the application. Depending on the valve we may need to subcontract this out to a valve maker.



## iAM Report - Quarterly<sup>6</sup>

Four 'Intelligent Asset Management' reports per asset per year will be supplied. iAM provides predictive, actionable insights for your asset from the asset's data log information.

Data for one report is collected onsite during the asset's annual scheduled visit. Our base price assumes that the customer collects data three times per year and delivers it to Rotork. Rotork data collection can be arranged at an additional cost.

Parts identified in an iAM 'suggested action' can be swapped out at the customer's request, the fee for the part being passed on to the customer if 'parts' cover is not included in their plan. Timings for any such maintenance are to be agreed between Rotork and the customer once the request has been made.

(Note iAM is NOT available for all actuators – check with the iAM team if you are unsure.)

# Questions & Answers

**Q: What is the difference between parts and consumables?**

A: Rotork supplies only genuine OEM parts and consumables. Consumables are things that can be reasonably expected to wear out over time through normal use. Parts should not generally wear out through normal use. Rotork limit consumables to oil seals, O-rings, 9v PP3 battery and oil. If we think about a car, consumables would be things like tyres, windscreen wiper blades and washer fluid. A customer would reasonably expect to need to change these from time-to-time. Parts include things like wing mirrors, doors or steering wheels – while it is possible to change these (and in limited circumstances necessary to change them) there would not be an expectation that they would NEED to be changed if the vehicle is used within its normal design limits.

**Q: What contract lengths do you offer, and what are the advantages to a longer contract?**

A: Our contracts are offered in lengths of one to five years, with a minimum term of one year. Longer contract terms can be more cost effective and guarantee uninterrupted maintenance of your asset over the contract term. If you require a contract term longer than five years please discuss with your local contact.

**Q: I would like to put my critical actuators in the 'Premium' tier, but 'Standard' would be okay for the other actuators on my site – is it possible to do this?**

A: Absolutely – you can mix and match different tiers across your site(s) – let us know which assets you would like in each tier and we can calculate a combined price for your particular site(s).

**Q: Where can I find more information about Rotork Reliability Services packages?**

A: You can find more information on our website – visit [www.rotork.com](http://www.rotork.com) and click on 'Services and Support' and then 'Lifetime Management'. Under 'Reliability Services' you will find more information about the tiers including documents that you can download and read at your convenience.

**Q: How do I sign up for a Rotork Reliability Services package?**

A: If you have a nominated local account manager please speak to them in the first instance, if not please contact us at [LifetimeManagement@rotork.com](mailto:LifetimeManagement@rotork.com) and a local contact will get back to you to discuss your particular requirements and find the best solution for you.

**Q: What is the warranty offered with each tier?**

A: On the 'Standard' and 'Premium' tiers, customers have an asset warranty for the duration of the Reliability Services product. On-site labour for warranty work is included in both the 'Standard' and 'Premium' tiers but travel to/from the site is not included as it is highly variable. The customer will be quoted for travel to/from a site at standard Rotork rates before the warranty visit. In addition, any parts changed under the Reliability Service agreement have a 12-month warranty from the date of installation – this may mean that individual parts continue to be 'under warranty' after the Reliability Services agreement has ended.

No warranty is included in the 'Basic – Health Check' tier, but if parts are changed as 'additional work', the standard Rotork 12-month warranty on those parts will apply.

In all cases the 'General Conditions of Sale' for Reliability Services apply.

## Notes

1. For Premium and Standard tiers Rotork will undertake an initial Site Survey. The initial Site Survey will check that your assets do not have any pre-existing faults. If we find that the asset has a pre-existing fault we will tell you what needs to be done to fix it and provide a quote. These repairs must be completed to a satisfactory standard for the asset to be eligible for a Premium or Standard tier Reliability Services Plan.
2. Excludes time taken to repair defects caused by; damage, out-of-specification working conditions, alteration, incorrect installation or 3rd party commissioning etc. Repeat callouts for the repeat fault covered solely at Rotork's discretion.
3. Includes consumables required during routine maintenance – limited to; environmental O-rings, oil seals, battery (9v PP3) and top-up oil only.
4. All parts that are not 'Consumables', excludes; motor, drive bush, centre column, worm shaft/wheel. Fair wear and tear rules apply. Replacement of non-OEM parts not covered.
5. Assumes data collected at time of annual visit. Rotork reserves the right to remove printable reports at any time. iAM not available for all asset types – please check with Rotork for a list of compatible asset types.
6. Assumes data for one report collected during the annual visit. The remaining data is to be collected by the customer and made available to Rotork. Data collection by a Rotork engineer is available at an additional cost. Includes priority report delivery and support from Rotork specialists who can assist with data collection, interpretation of iAM reports and corrective action advice. Rotork reserves the right to remove printable reports at any time. iAM not available for all asset types – please check with Rotork for a list of compatible asset types.

A dark blue, stylized world map is centered in the background of the lower half of the page. The map shows the outlines of the continents and is overlaid with a pattern of concentric, wavy lines that suggest global connectivity or signal waves.

[www.rotork.com](http://www.rotork.com)

A full listing of our worldwide sales and service network is available on our website.

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