Site Survey Preparation Checklist

What the plant can prepare before TDL engineers survey an existing control system. Items that are not available can be collected during the survey.

Existing system

- [ ] PLC or controller model and firmware version
- [ ] Software and versions (programming, HMI, SCADA)
- [ ] Approximate I/O or tag count
- [ ] A network sketch or architecture drawing
- [ ] Photos of the panels and nameplates

Programs and documents

- [ ] Latest PLC, HMI and SCADA program backups, if available
- [ ] Electrical drawings and I/O lists
- [ ] P&ID or process description, where relevant
- [ ] Known problems and recent alarm history

Site access

- [ ] Safety induction and permit-to-work requirements
- [ ] Contact person on site
- [ ] Shutdown windows or production times when the survey can take place
- [ ] Areas with special PPE or hazardous-area rules

Goals and constraints

- [ ] What should change: upgrade, extension or new function
- [ ] Target dates and planned shutdowns
- [ ] Plant or company standards the new system must follow