

EQUIPMENT SETUP PROCEDURE

Equipment Name:	[Enter equipment name/model]	Document ID:	[SETUP-XXX]
Manufacturer:	[Manufacturer name]	Model/Serial:	[Model # / SN]
Department:	[Production/Lab/Maintenance]	Version:	[Rev 1.0]
Location:	[Building/Room/Area]	Date:	[MM/DD/YYYY]

EQUIPMENT IDENTIFICATION

EQUIPMENT PHOTO - FRONT VIEW	EQUIPMENT PHOTO - CONTROL PANEL
[Insert photo of equipment from front]	[Insert photo of control panel/interface]

Component	Location	Function
[Power switch]	[Specify location on equipment]	[Brief description of function]
[Control panel]	[Location]	[Function]
[Emergency stop]	[Location]	[Function]
[Input/Output connections]	[Location]	[Function]
[Key indicator lights]	[Location]	[What they indicate]
[Add more components]	[Location]	[Function]

PRE-OPERATION SAFETY CHECKS

Complete ALL safety checks before proceeding with setup. Do not operate equipment if any check fails.

Safety Check Item	Visual Verification Point	Pass Criteria	✓
Work area clear	Check 3-foot radius around equipment	No obstructions or trip hazards	☐
Emergency stop accessible	Locate and test emergency stop button	Button accessible and functional	☐
Power source verified	Check power connection and voltage	Matches equipment specifications	☐
Guards/shields in place	Inspect all safety guards	Properly installed and secure	☐
Ventilation adequate	Check exhaust/ventilation system	System operational if required	☐
Personal PPE donned	Verify all required PPE worn	Per safety requirements below	☐
No unauthorized personnel	Check work area	Only trained operators present	☐
[Add equipment-specific check]	[Verification method]	[Pass criteria]	☐

■ REQUIRED PERSONAL PROTECTIVE EQUIPMENT (PPE)

☐ Safety Glasses ☐ Hearing Protection ☐ Gloves (specify type: _____) ☐ Steel-Toe Boots
☐ Face Shield ☐ Lab Coat ☐ Respirator ☐ Other: _____

REQUIRED MATERIALS & TOOLS

Item	Specification	Quantity	✓
[Tool name]	[Size, type, calibration status]	[#]	[]
[Consumable/supply]	[Grade, lot number if required]	[#]	[]
[Connection cables]	[Type, length]	[#]	[]
[Calibration standard]	[Cert # and expiration]	[#]	[]
[Add items as needed]	[Specifications]	[#]	[]

SETUP SEQUENCE

Follow these steps in exact order. Do not skip steps.

STEP 1: [Brief step description - e.g., Connect power supply]

BEFORE / PREPARATION	DURING / IN PROGRESS
[Photo showing starting condition]	[Photo showing step being performed]
ANNOTATED REFERENCE - Key points marked	
[Insert annotated photo showing critical details with arrows, circles, or callouts]	

Detailed Instructions:
1. [First specific action to take] 2. [Second specific action] 3. [Third specific action] 4. [Include all sub-steps needed]
Settings/Parameters:
• Voltage: [Specify value and tolerance] • Position: [Describe exact position/orientation] • Torque: [If applicable, specify value] • [Any other critical specifications]
■ Critical Points:
• [Highlight safety concerns for this step] • [Note common mistakes to avoid] • [Specify sequence dependencies] • [Mention quality checkpoints]
Verification:
[How to confirm this step is completed correctly - e.g., "Green LED illuminates" or "Connection is secure with no movement"]
[] Step Completed by: [Initials: _____ Time: _____]

STEP 2: [Brief step description]

BEFORE / DURING	ANNOTATED REFERENCE
[Photo of step]	[Annotated photo with key points marked]
Instructions: [Describe what to do in this step]	
Settings: [Key parameters or settings]	

Verification: [How to confirm completion] | ☐ **Complete:** [Initials: _____]

STEP 3: [Brief step description]

BEFORE / DURING	ANNOTATED REFERENCE
[Photo of step]	[Annotated photo with key points marked]
Instructions: [Describe what to do in this step]	
Settings: [Key parameters or settings]	
Verification: [How to confirm completion] ☐ Complete: [Initials: _____]	

STEP 4: [Brief step description]

BEFORE / DURING	ANNOTATED REFERENCE
[Photo of step]	[Annotated photo with key points marked]
Instructions: [Describe what to do in this step]	
Settings: [Key parameters or settings]	
Verification: [How to confirm completion] ☐ Complete: [Initials: _____]	

STEP 5: [Brief step description]

BEFORE / DURING	ANNOTATED REFERENCE
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[Photo of step]	[Annotated photo with key points marked]
Instructions: [Describe what to do in this step]	
Settings: [Key parameters or settings]	
Verification: [How to confirm completion] [☐] Complete: [Initials: _____]	

STEP 6: [Brief step description]

BEFORE / DURING	ANNOTATED REFERENCE
[Photo of step]	[Annotated photo with key points marked]
Instructions: [Describe what to do in this step]	
Settings: [Key parameters or settings]	
Verification: [How to confirm completion] [☐] Complete: [Initials: _____]	

Continue adding setup steps as needed following the format above.

OPERATIONAL TEST PROCEDURES

Perform these tests to verify equipment is functioning correctly before production use.

TEST 1: [Test name - e.g., Power-On Self Test]

Test Purpose: [What this test verifies]			
Test Procedure: 1. [First action to perform] 2. [Second action] 3. [Observation to make] 4. [Final verification step]			
Expected Results:			
[Describe what should happen - e.g., "All indicator lights illuminate green"] [Include specific values or readings expected] [Note timing expectations if relevant] [Include any audio or visual cues]			
EXPECTED RESULT - VISUAL REFERENCE			
[Insert photo or screenshot showing expected display, indicator lights, or readings]			
Test Result	Actual Reading/Observation	Pass/Fail	Operator Initials
[Parameter 1]	[Record actual value]	[] Pass [] Fail	
[Parameter 2]	[Record actual value]	[] Pass [] Fail	
Overall Test Result:	[Notes if any anomalies]	[] Pass [] Fail	

TEST 2: [Test name]

Purpose: [What this test verifies]			
Procedure: [Steps to perform test]			
Expected Results: [What should happen]			
EXPECTED RESULT			
[Photo/screenshot]			
Test Result:	☐ Pass ☐ Fail	Notes:	[Record any observations]
		Initials:	

TEST 3: [Test name]

Purpose: [What this test verifies]			
Procedure: [Steps to perform test]			
Expected Results: [What should happen]			
EXPECTED RESULT			
[Photo/screenshot]			
Test Result:	☐ Pass ☐ Fail	Notes:	[Record any observations]
		Initials:	

TEST 4: [Test name]

Purpose: [What this test verifies]			
Procedure: [Steps to perform test]			
Expected Results: [What should happen]			
EXPECTED RESULT			

[Photo/screenshot]

Test Result:

☐ Pass ☐ Fail

Notes:

[Record any observations]

Initials:

Add additional tests as required for your equipment.

SHUTDOWN PROCEDURE

Follow these steps when shutting down equipment at end of shift or for maintenance.

Step	Action	Verification	✓
1	[First shutdown action - e.g., "Stop all running processes"]	[How to confirm - e.g., "All activity ceased"]	[]
2	[Allow equipment to cool/drain/etc.]	[Temperature reading or condition]	[]
3	[Turn off main controls in proper sequence]	[Control panel shows off status]	[]
4	[Disconnect power or utilities if required]	[Power indicator off]	[]
5	[Clean equipment per cleaning SOP]	[Visually clean, no debris]	[]
6	[Secure area and replace guards/covers]	[All guards in place]	[]
7	[Complete shutdown log/documentation]	[Log entry completed]	[]
8	[Add equipment-specific steps]	[Verification criteria]	[]

STORAGE PROCEDURE

When equipment will not be used for extended periods, follow these storage procedures.

Short-Term Storage (1-7 days):
• [Complete normal shutdown procedure] • [Cover equipment with protective cover] • [Maintain climate control in area] • [Check equipment daily for any issues]
Long-Term Storage (7+ days):

- [All of above, plus:]
- [Drain all fluids or fill with storage fluid]
- [Apply corrosion inhibitors if applicable]
- [Disconnect all utilities]
- [Lock out/tag out per safety procedures]
- [Document storage date and condition]
- [Schedule periodic inspection during storage]

Return to Service After Storage:

- [Perform complete visual inspection]
- [Reconnect utilities and verify connections]
- [Perform all pre-operation safety checks]
- [Run all operational test procedures]
- [Do NOT skip setup verification after storage]

TROUBLESHOOTING COMMON SETUP ISSUES

Problem/Symptom	Possible Cause	Corrective Action
Equipment won't power on	• Power not connected • Circuit breaker tripped • Emergency stop engaged	• Verify power connection • Reset breaker • Release E-stop button
[Common issue 2]	[Possible causes]	[Steps to resolve]
[Common issue 3]	[Possible causes]	[Steps to resolve]
[Common issue 4]	[Possible causes]	[Steps to resolve]

SETUP COMPLETION SIGN-OFF

Setup Performed By:	Name: _____ _____	Signature: _____ _____	Date/Time: _____ _____
Setup Verified By:	Name: _____ _____	Signature: _____ _____	Date/Time: _____ _____

Equipment Ready for Production:	☐ YES - All checks passed	☐ NO - Issues documented below:	
Notes/Issues:			

HOW TO USE THIS TEMPLATE

1. Replace all bracketed text with your equipment-specific information
2. Insert actual photos showing your equipment at each step
3. Add annotations (arrows, circles, callouts) to highlight critical details
4. Customize safety checks and tests for your equipment requirements
5. Include manufacturer specifications and recommended procedures
6. Test the setup procedure with operators before finalizing
7. Update photos and steps whenever equipment or procedures change

■ *Create interactive equipment setup guides with Supademo.com - record your setup process once and automatically generate step-by-step visual instructions with annotations that teams can access on any device.*