JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Writing Operating and Maintenance Procedures Training Course

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Writing Operating and Maintenance Procedures Training Course

Writing Operating and Maintenance Procedures is a 1-week training course for maintenance planners, supervisors and technical writers who turn equipment knowledge into a validated equipment procedure set ready for field use. Plants and facilities lose output and suffer injuries when start-up, shutdown and repair steps live only in the heads of senior technicians. Jupiter Prime Training runs this course on Writing Operating and Maintenance Procedures.

Why Writing Operating and Maintenance Procedures Matters Now

Three pressures make procedure quality urgent. Experienced operators and fitters are retiring, and their tacit know-how on pumps, compressors and switchgear must be captured before it leaves. Contractors and rotating crews now perform more tasks, so each step must be readable by someone new to the asset. Digital work packs and mobile CMMS screens demand short, structured steps rather than long manuals. Sites with clear procedures cut rework and isolation errors; sites without them repeat the same incidents. The course aligns with ISO 55001 asset management and EN 13306 maintenance terminology.

Who Gains Most from Writing Operating and Maintenance Procedures

- Planners who build job plans and work packs for preventive and corrective tasks
- Supervisors who sign off field steps and coach crews on correct sequences
- Technical writers who own the format and style of plant documents
- Operations engineers responsible for start-up, shutdown and changeover instructions
- Document controllers who manage revisions, approvals and obsolete copies

Maintenance and operations groups from the same site gain most when several members attend together and agree one procedure template.

Writing Operating and Maintenance Procedures Capabilities

Participants learn to convert a walkdown of real equipment into numbered steps a technician can follow under pressure.

- Apply hierarchical task analysis to equipment jobs — the scope of each procedure
- Design step layouts with action verbs, checkpoints and sign-offs — field crews and supervisors
- Specify warnings, cautions and isolation points correctly — safety of people performing the task
- Test draft steps through field walkdowns with users — the decision to release a procedure
- Build revision, approval and periodic review routines — document controllers and auditors
- Communicate changes to crews through briefings and markups — consistent practice on every shift

Key Writing Operating and Maintenance Procedures Terms

- Hierarchical task analysis — breaking a job into goals, subtasks and individual actions to decide what each procedure must cover.
- Standard operating procedure — a controlled document that sets the approved sequence for running equipment in normal and abnormal conditions.
- Maintenance job plan — the steps, parts, tools, permits and durations needed to complete one maintenance task.
- Hold point — a step where work stops until a named person verifies a reading, isolation or quality check.
- Procedure walkdown — a field trial in which users follow the draft at the equipment to find gaps and errors.
- Revision control — the rules for numbering, approving and withdrawing procedure versions so only the current copy is used.

Writing Operating and Maintenance Procedures Day by Day

Day 1: Procedure Purpose and Users

- Procedure Types and Tiers — Choosing Instruction, Checklist or Job Plan
- Reader Profiling for Operators and Fitters — Setting Reading Level
- Critical Task Identification — Deciding Which Jobs Need Written Steps
- Incident and Near-Miss Records — Finding Gaps in Current Documents
- Procedure Templates Across Sectors — Comparing Utilities and Process Plants

Day 2: Task Analysis at the Equipment

- Hierarchical Task Analysis — Splitting Jobs into Goals and Actions
- Field Walkdown Interviews With Technicians — Capturing Tacit Know-How
- Equipment Drawings and Vendor Manuals — Extracting Usable Step Content
- Isolation and Permit Points — Placing Energy Control in Sequence
- Tools, Spares and Consumables Lists — Preparing the Job Before Start

Day 3: Step Structure and Plain Wording

- Action Verb and One-Action-per-Step Rules — Reducing Misreading in the Field
- Warnings, Cautions and Notes Hierarchy — Placing Hazard Messages Correctly
- Hold Points and Sign-Off Boxes — Verifying Readings Before Proceeding
- Tables, Flowcharts and Annotated Photos — Choosing the Clearest Format
- Abnormal and Emergency Steps — Writing Contingency Branches

Day 4: Validation and Document Control

- Desk Check and Peer Technical Review — Catching Errors Before Trials
- Field Trial With End Users — Release or Rewrite Decisions
- Approval Routes and Revision Numbering — Controlling the Current Copy
- CMMS and Mobile Work Pack Links — Delivering Steps at the Asset
- Periodic Review and Change Triggers — Keeping Steps Matched to Plant Changes

Day 5: Practising the Validated Equipment Procedure Set

- Task Analysis of a Selected Asset — Applying Day Two Methods
- Drafting Steps, Warnings and Hold Points — Applying Structure Rules
- Peer Walkdown of the Draft — Recording User Corrections
- Crew Briefing Plan for Release — Communicating the New Sequence
- Validated Equipment Procedure Set — Completing the Release Package

Applying Writing Operating and Maintenance Procedures After the Course

- Rewrite the procedure for one critical pump or compressor overhaul using hierarchical task analysis and a field walkdown.
- Audit five live procedures against the step structure rules and log revisions in the document control register.

Writing Operating and Maintenance Procedures Questions FAQ

What is Writing Operating and Maintenance Procedures and why does it matter now?

It is the discipline of turning equipment knowledge into clear, tested steps for running and repairing assets. It matters now because retiring experts, mixed crews and digital work packs all depend on instructions anyone can follow safely.

Which roles gain most from Writing Operating and Maintenance Procedures training?

Maintenance planners, supervisors and technical writers gain most. Operations engineers and document controllers also benefit.

How does Writing Operating and Maintenance Procedures differ from a policies and procedures drafting course?

It works at the equipment, not at corporate policy level. You analyse real maintenance and operating tasks, write field steps with isolation points and hold points, and test them with technicians.

What do you bring back from Writing Operating and Maintenance Procedures training?

You bring back a validated set of equipment procedures for one asset. It includes task analysis, structured steps, warnings, hold points and a release briefing for crews.

Writing Operating and Maintenance Procedures: The Way Forward

The validated equipment procedure set first informs which critical tasks are released to crews and which need rewriting. Planners attach it to work packs, supervisors brief from it and document controllers file its revisions. After the first overhaul or shutdown that uses it, revisit the field corrections to decide whether the template and hold points need adjusting.