

1 CUSTOMER / PROJECT DETAILS

Customer / company	Date
Contact person / telephone / email	Project / enquiry reference
Site / plant / department	Equipment tag / criticality
Required trial / delivery date	Completed by / position

2 REQUEST & LUBRICANT TYPE

Request:	New selection	Replacement	Problem solving	Consolidation	Trial	Recommend	
Type:	Grease	Oil	Paste	Dry-film	Chain oil	Gear oil	Other
Current supplier / product / grade	Preferred AIGI / Tri-Lube / other range						
Reason for change / current shortcomings	Desired result / measurable target						

3 EQUIPMENT & APPLICATION

Application:	Rolling bearing	Plain bearing	Electric motor	Gearbox	Open gear	Chain	Coupling	Slide / guide	Wire rope	Valve	Other
Equipment manufacturer / model	Bearing / gear / component designation										
Application description / driven equipment	Orientation / sealed, shielded or open										
Number of lubrication points	Operating hours / starts / duty cycle										

4 LOAD • ENVIRONMENT • TEMPERATURE • SPEED (LETS)



Radial / axial load, C/P or load zone	Shock load / vibration / oscillation
Ambient / operating / peak temperature (°C)	Cold-start temperature / warm-up time
Speed (rpm) / surface speed / oscillation	Water, steam, dust, chemicals or outdoor exposure
Bearing bore d / OD D / width B / mean dia. dm	DN or n-dm speed factor / cavity volume

5 ADDITIONAL OPERATING CONDITIONS

Exposure:	Washdown	Submerged	Steam	Dust / fines	Corrosive fumes	Marine	Vacuum	Oxygen	Radiation	Cleanroom
Process media / chemical / concentration	Pressure / humidity / contamination ingress									
Normal operating pattern / standby periods	Failure consequence / safety or production risk									

6 EXISTING LUBRICANT & SERVICE HISTORY

Manufacturer / product / grade	SDS / TDS / batch or sample reference
NLGI grade / worked penetration	Thickener / complex / soap type
Base oil type / viscosity @ 40°C and 100°C	Additives: EP / AW / solids / tackifier / inhibitor
Service temperature / dropping point	Colour / texture / odour / condition
Time in service / relubrication interval	Consumption per point / month / year

7 LUBRICATION METHOD, QUANTITY & DELIVERY

Method:	Manual gun	Single-point auto	Centralised	Bath	Splash	Circulation	Drip	Spray	Packed for life
Fill quantity / initial charge / shot volume	Frequency / interval / purge quantity								
Port / thread / nipple / line size and length	Pump make / type / pressure / temperature								
Reservoir capacity / number of points	Return, drain or purge path / access limitations								

8 GREASE COMPATIBILITY & CHANGEOVER

Existing thickener / base oil / additives	Known compatibility or mixing restriction
Can system be cleaned / flushed / fully purged?	Changeover procedure / transition quantity
Seal / elastomer / plastic materials	Metals, coatings and process-product contact
Cross-contamination controls / dedicated tools	Storage and dispensing conditions

9 REQUIRED PERFORMANCE

Priority:	EP / heavy load		Wear protection		Water washout		Corrosion control		High temperature		Low temperature					
Also:	High speed		Low torque		Low noise		Tackiness		Oxidation life		Mechanical stability		Low bleed		Pumpability	
Required service life / relube extension								Minimum / maximum application temperature								
Performance test / client limit / acceptance criterion								Preferred texture, colour or odour								

10 CURRENT SYMPTOMS & EVIDENCE

Observed:	Overheating	Noise	Vibration	Leakage	Washout	Hardening	Softening	Oil separation	Starvation	Churning
Corrosion / wear / blocked lines / seal damage	Temperature, vibration, power or wear trend									
Failure date / bearing life / inspection findings	Photo / failed part / used grease sample reference									
Maintenance history / corrective actions tried	Root-cause report / laboratory analysis									

11 REQUESTED / RECOMMENDED LUBRICANT SPECIFICATION

NLGI:	000	00	0	1	2	3	Recommend		
Base oil:	Mineral	PAO	Ester	PAG	Silicone	PFPE	Vegetable	Recommend	
Thickener:	Lithium	Lithium complex	Calcium sulfonate complex	Calcium	Aluminium complex	Polyurea	Clay	PTFE	Recommend
Base oil viscosity range @ 40°C / 100°C	Operating / application temperature range								
Four-ball weld / wear / Timken OK load	Water washout / spray-off / corrosion / EMCOR								
Dropping point / bleed / oxidation / stability	Other ASTM / DIN / ISO / client test requirement								

12 APPROVALS, SAFETY & DOCUMENTATION

Required:	SDS	TDS	COA	COC	NSF H1	NSF H2	3H	Halal	Kosher	Biodegradable	Marine
Food / potable / pharmaceutical / cleanroom requirement	SANS / ISO / DIN / ASTM / OEM specification										
Restricted substances / toxicity / VOC requirements	Shelf life / storage / transport restrictions										

13 PACKAGING, CONSUMPTION & LOGISTICS

Pack:	400 g cartridge	Can	5 kg	20 kg	50 kg	180 kg drum	Bulk	Other
Trial / order / monthly / annual quantity	Delivery site / lead time / stockholding							
Dispensing equipment / cartridge type	Target cost / consolidation opportunity							

14 TRIAL, MONITORING & ACCEPTANCE

Trial location / equipment / responsible person	Start date / duration / baseline product
Application and changeover instructions	Temperature / vibration / energy / noise checks
Sampling / grease analysis / inspection plan	Success criteria / approval authority

15 RECOMMENDATION, NOTES & ATTACHMENTS

Recommended product / grade / NLGI	Quantity / interval / method / changeover
Use conditions / exclusions / review date	Drawing / photo / SDS / TDS / report references
Notes	