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**BS EN 62337:2012**

*Incorporating corrigendum December 2012*



**BSI Standards Publication**

# **Commissioning of electrical, instrumentation and control systems in the process industry — Specific phases and milestones**

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This British Standard is the UK implementation of EN 62337:2012. It is identical to IEC 62337:2012, incorporating corrigendum December 2012. It supersedes BS EN 62337:2007 which is withdrawn.

The start and finish of text introduced or altered by corrigendum is indicated in the text by tags. Text altered by IEC corrigendum December 2012 is indicated in the text by AC1 AC1.

The UK participation in its preparation was entrusted to Technical Committee AMT/7, Industrial communications: process measurement and control, including fieldbus.

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This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

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English version

**Commissioning of electrical, instrumentation and control systems in the  
process industry -  
Specific phases and milestones  
(IEC 62337:2012)**

Mise en service des systèmes électriques,  
de mesure et de commande dans  
l'industrie de transformation -  
Phases et jalons spécifiques  
(CEI 62337:2012)

Inbetriebnahme elektrischer und  
leittechnischer Systeme in der  
verfahrenstechnischen Industrie -  
Phasen und Meilensteine  
(IEC 62337:2012)

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Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CENELEC member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CENELEC member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

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European Committee for Electrotechnical Standardization  
Comité Européen de Normalisation Electrotechnique  
Europäisches Komitee für Elektrotechnische Normung

**Management Centre: Avenue Marnix 17, B - 1000 Brussels**

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### Foreword

The text of document 65E/221/FDIS, future edition 2 of IEC 62337, prepared by SC 65E, "Devices and integration in enterprise systems", of IEC TC 65, "Industrial-process measurement, control and automation" was submitted to the IEC-CENELEC parallel vote and approved by CENELEC as EN 62337:2012.

The following dates are fixed:

- latest date by which the document has to be implemented at national level by publication of an identical national standard or by endorsement (dop) 2012-12-28
- latest date by which the national standards conflicting with the document have to be withdrawn (dow) 2015-03-28

This document supersedes EN 62337:2007.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CENELEC [and/or CEN] shall not be held responsible for identifying any or all such patent rights.

### Endorsement notice

The text of the International Standard IEC 62337:2012 was approved by CENELEC as a European Standard without any modification.

In the official version, for Bibliography, the following notes have to be added for the standards indicated:

- |                  |      |                                |
|------------------|------|--------------------------------|
| IEC 61331 series | NOTE | Harmonized in EN 61331 series. |
| IEC 61355-1      | NOTE | Harmonized as EN 61355-1.      |

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**Annex ZA**  
(normative)

**Normative references to international publications  
with their corresponding European publications**

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

NOTE When an international publication has been modified by common modifications, indicated by (mod), the relevant EN/HD applies.

<u>Publication</u>	<u>Year</u>	<u>Title</u>	<u>EN/HD</u>	<u>Year</u>
IEC 62079	-	Preparation of instructions - Structuring, content and presentation	EN 62079	-
IEC 62424	-	Representation of process control engineering - Requests in P&I diagrams and data exchange between P&ID tools and PCE-CAE tools	EN 62424	-
ISO 10628-2 <sup>1)</sup>	-	Diagrams for the chemical and petrochemical industry - Part 2: Graphical symbols	EN ISO 10628-2 <sup>1)</sup>	-
ANSI/ISA S7.0.01	-	Quality Standard for Instrument Air	-	-

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<sup>1)</sup> At draft stage.

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## INTRODUCTION

There is an increasing trend in the process industry to award the construction of whole plants to contractors on a lump-sum turnkey or similar commercial basis. Experience has shown that both the process industry (hereinafter called "the owner") and the contractor have long and expensive discussions to lay down unambiguously the scope of activities to be taken by the contractor and the owner and their responsibilities to achieve the handover of the plant.

This standard is intended to lead to an improvement and acceleration of the negotiation phase and to a mutual understanding about the scope of the activities of each party.

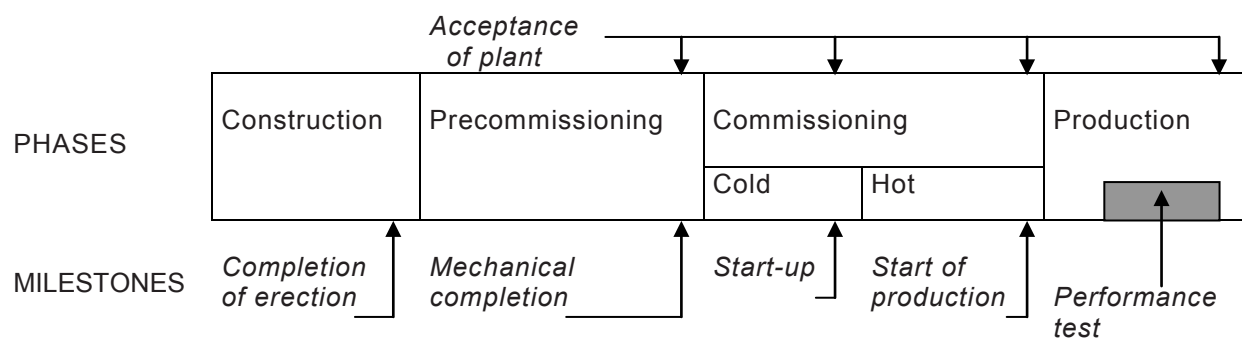
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## COMMISSIONING OF ELECTRICAL, INSTRUMENTATION AND CONTROL SYSTEMS IN THE PROCESS INDUSTRY – SPECIFIC PHASES AND MILESTONES

### 1 Scope

This International Standard defines specific phases and milestones (see Figure 1) in the commissioning of electrical, instrumentation and control systems in the process industry. By way of example, it describes activities following the “completion-of-erection” milestone of the project and prior to the “acceptance-of-the-plant” phase by the owner. Such activities need to be adapted for each type of process/plant concerned.

NOTE This standard assumes that the “acceptance-of-the-plant” milestone will occur after the performance test. If there is a reduced scope, this document should be adapted accordingly.



IEC 135/12

NOTE Construction and precommissioning activities could be overlapping.

**Figure 1 – Definition of phases and milestones**

For application in the pharmaceutical or other highly specialized industries, additional guidelines (for example, *Good Automated Manufacturing Practice (GAMP)*), definitions and stipulations should apply in accordance with existing standards, for example, for GMP Compliance 21 CFR (FDA) and the Standard Operating Procedure of the European Medicines Agency (SOP/INSP/2003).

### 2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

IEC 62079, *Preparation of instruction – Structuring, content and presentation*

IEC 62424, *Representation of process control engineering – Requests in P&I diagrams and data exchange between P&ID tools and PCE-CAE tools*

ISO 10628-2, *Diagrams for chemical and petrochemical industry – Part 2: Graphical symbols*

ISA-S7.0.01, *Quality standard for instrument air*



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### 3 Terms and definition

For the purposes of this document, the following terms and definitions apply<sup>2</sup>.

#### 3.1

##### **precommissioning**

phase during which the activities of non-operating adjustments, cold alignment checks, cleaning, and testing of machinery take place

NOTE Refer to Annex B for the detailed activities.

#### 3.2

##### **mechanical completion**

milestone which is achieved when the plant, or any part thereof, has been erected and tested in accordance with drawings, specifications, instructions, and applicable codes and regulations to the extent necessary to permit cold commissioning

NOTE This includes completion of all necessary electrical and instrumentation work. This is a milestone marking the end of the precommissioning activities.

#### 3.3

##### **cold commissioning**

phase during which the activities associated with the testing and operation of equipment or facilities using test media such as water or inert substances, prior to introducing any chemical in the system, take place

#### 3.4

##### **start-up**

milestone marking the end of cold commissioning

NOTE At this stage, the operating range of every instrument loop should already be adjusted to reflect the actual working condition.

#### 3.5

##### **hot commissioning**

phase during which the activities associated with the testing and operation of equipment or facilities using the actual process chemical, prior to making an actual production run, take place

#### 3.6

##### **start of production**

milestone marking the end of hot commissioning

NOTE At this stage, the plant is ready for full and continuous operation.

#### 3.7

##### **performance test**

milestone at which time the production plant runs to its design capacity

NOTE This test, carried out by the owner's personnel with the help and supervision of the contractor, serves to demonstrate the contractor's process performance and consumption guarantees as specified in the contract.

#### 3.8

##### **acceptance of plant**

milestone in which the formal turnover of the plant from the contractor to the owner is carried out

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<sup>2</sup> Future standard IEC 62708 will provide additional information on the terms used in this document.

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NOTE At this stage, the contractor is relieved from any obligation, with the exception of defect liability and any other outstanding obligations which are part of the contract. The owner resumes full responsibility for running and maintaining the plant.

### 3.9

#### **owner**

company that hired a contractor to build a plant

### 3.10

#### **contractor**

company which is hired by the owner to design and build a plant

NOTE This company is responsible for all activities as described in a separate contract including, for example, the engineering design, procurement, erection of the plant as well as the implementation of all tests and acceptances that are necessary to deliver a serviceable plant. This company may also be responsible for training the owner's production as well as maintenance personnel on plant operation.

### 3.11

#### **licenser**

company or individual that has a process know-how which willingly provides the owner with the technology to be used in the construction, operation and maintenance of a plant, or part of the process in such a plant

### 3.12

#### **vendor**

manufacturer or distributor of a piece of equipment/instrument/package unit

NOTE The vendor is the expert for proper installation as well as operation of the equipment/ instrument/ package unit.

### 3.13

#### **process industry**

industry that uses chemical reactions, separations, or mixing techniques in order to create new products, modify existing products or treat waste and includes the following types of industries: chemical, petrochemical, waste treatment, paper, cement, etc. It does not include such industries as equipment/machine manufacturing or other similar industries. Industries which are subject to special requirements and or validation, etc. are also not included.

### 3.14

#### **manpower mobilization plan**

bar chart schedule with associated resources and qualifications

### 3.15

#### **vendor documentation**

product describing documents

Example Datasheets, handbooks, operating manuals and spare part lists of supplied devices or systems are parts of a vendor documentation.

### 3.16

#### **pipng and instrumentation diagram**

##### **P&ID**

diagram according to DIN EN ISO 10628 including plant process equipment and connecting piping. E&I equipment shown according project specific requirements

### 3.17

#### **general design requirements**

design guideline adapted from project specific requirements as well as from relevant legal requirements and regulations

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**3.18****test report**

documentation of test sequence and result

**3.19****test plan**

overview of tests as provided in the contract

**3.20****punch list**

list of all open tasks

**3.21****check list**

list of all tests

**3.22****operating manual**

manufacturer's instruction for the intended handling and using of a device or system according to IEC 62079

**3.23****process flow diagram**

diagram according to DIN EN ISO 10628 including plant process equipment and important connecting piping. Important E&I equipment shown according project specific requirements

**3.24****loop list**

tabulated list of all E&I tags with tagging, function and PID reference

**3.25****instrument index**

tabulated list of all instruments per tag including tagging, instrument type and labelling

**3.26****loop diagram**

representation of hardware and/or software functions of a control loop with graphical symbols e.g. according to IEC 62424. It shows equipment in its topological order and wiring including the terminals

**3.27****loop sheet**

data sheet with all essential E&I data concerning tagging, function, description, measuring range, location, process data, instrument data, etc.

**3.28****hazardous area classification drawing**

plan showing the hazardous areas and temperature classes. The area classification shall be clearly indicated by class and division

**3.29****AC1 plot plan E&I AC1**

presentation of the locations of E&I equipment in layout and building drawings

**3.30****cabinet layout drawing**

drawing to scale of equipment, terminal strips, cable trays etc. in cabinets, consoles and similar

**3.31****function diagram or logic diagram**

description of the E&I functions according to IEC 61131 Use of such a diagram is limited to digital signal processing only

**3.32****functional description**

verbal description of task, function and operation of E&I logic like sequence-, batch control and interlocks

**4 General preparations before acceptance of plant**

The following items shall be completed in accordance with the responsibilities as defined within the contract.

## a) Documents

The documents agreed upon according to A.1 shall be issued by the contractor to the owner.

## b) Manpower mobilization plan

The agreed amount of manpower required both from the owner and from the contractor, including their qualification and their availability, shall be available. The organization of personnel during precommissioning, commissioning and performance testing shall be established.

## c) Equipment and tools

The agreed required tools and equipment to be supplied by the owner or the contractor shall be available.

## d) Raw materials and utilities

For the agreed supply of raw materials and utilities, the contractor and the owner shall agree upon a detailed time schedule and the conditions for supply within a reasonable time before the completion of erection.

## e) Catalysts and consumables

For the agreed supply of required catalysts, lubricants, chemicals and other consumables, the contractor and the owner shall agree upon a detailed time schedule and conditions within a reasonable time before the completion of erection.

**5 Completion of erection****5.1 Mechanical checks and tests**

After erection of the plant, of each piece of equipment, facility or discrete part of the plant, mechanical checks and tests shall be carried out by the contractor.

The mechanical checks and tests shall verify that:

- a) the plant is erected in accordance with the piping and instrument diagram (P&I), plot plan and the vendor's documentation;
- b) the equipment is installed and mechanically functions in accordance with the general design requirements;
- c) applicable codes, as listed in the general design requirements, are followed for materials and workmanship.

Items such as painting, thermal insulation and final clean-up which would not affect the operation or safety of the plant could be excluded. All these items shall be listed and

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completed after precommissioning or commissioning within a mutually agreed schedule between the contractor and the owner but before the acceptance of the plant.

## 5.2 Procedure

The following shall apply:

- a) The contractor shall prepare and maintain on-site test reports and records which shall include the following information:
  - description of the type of test or check;
  - date and time of test or check;
  - identification of equipment and facilities;
  - test pressure if applicable, test data and results, including remarks, if any;
  - signature of the owner's personnel witnessing the data recorded, if required.
- b) Check, test and records thereof shall be carried out by the contractor's personnel.

Wherever the owner's witness or attesting for the check or test is required, the owner's personnel shall attend such check and test. For this purpose, the contractor shall keep the owner informed of the day-to-day test-plan schedule. The test-plan schedule should be constantly revised to reflect the actual progress of the work and test.

- c) Any items found incomplete or requiring repair or adjustment shall be marked as such on a separate punch list and reported by the contractor to the owner's and the contractor's personnel in charge of the relevant construction area. The check list for items in the punch list will be left blank until the problem has been corrected.
- d) The contractor shall expedite and follow up the termination of all incomplete, repaired or adjusted work items in the punch list and shall keep these expediting records up to date.
- e) Checking procedures shall be repeated until all the items on the check list are cleared.
- f) At the completion of each test, the owner shall certify on the test reports that the test has been satisfactory; otherwise, the contractor shall repeat the tests. Upon satisfactory completion of the re-test, re-certification by the owner shall be made accordingly.
- g) A complete set of test reports shall be handed over to the owner on completion and, at this date, the completion of the erection shall be considered as achieved.

## 6 Precommissioning (mechanical completion)

### 6.1 General

After completion of the erection, the precommissioning activities listed in the procedure defined in Annex B and the final steps listed in AC1 6.2 AC1 shall be carried out in accordance with the contract to make the plant mechanically complete and ready for commissioning.

The documents to be utilized are listed in Annex A.

### 6.2 Procedure

- a) The contractor's personnel responsible for the checks, tests and recording of results on the completion of erection shall be responsible for the completion of any remaining work, adjustments and repairs of the equipment marked on the check list during precommissioning and for the maintenance of appropriate records.
- b) The contractor's personnel appointed for commissioning should also participate in the precommissioning work to verify the satisfactory performance of the plant.
- c) During the checks and tests, the contractor's personnel is responsible for training the owner's personnel on the operation of the plant, as defined within the contract.

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- d) The owner or the contractor shall furnish operating and maintenance personnel, according to the manpower mobilization plan, to perform those parts of the precommissioning work, which are agreed to be the owner's responsibility in accordance with AC1 Annex B AC1.
- e) The contractor shall ensure that his personnel work in close conjunction with the owner's personnel by providing supervision and advice where necessary.
- f) The contractor shall prepare detailed procedures for each precommissioning activity listed in Annex B. Procedures shall be updated or added by the contractor as necessary to support any additional work.
- g) Mechanical completion shall be confirmed on each part/section/unit/facility of the plant individually.
- h) A detailed schedule for the precommissioning of each part/section/unit/facility shall be submitted by the contractor to the owner before completion of the erection.
- i) Upon completion of the precommissioning activities of each part/section/unit/facility of the plant, the contractor shall submit to the owner a written notice of mechanical completion, which shall include:
  - identity of a part/section/unit/facility of the plant considered mechanically complete;
  - a copy of all relevant completed test reports;
  - the date on which the completion of the tests was achieved;
  - a check list;
  - a request for acceptance of a mechanical completion certificate in respect of that part/section/unit/facility.
- j) Within an agreed period from the date of receipt of the contractor's written notice, the owner shall:
  - in the case of acceptance:
    - sign the issued mechanical completion certificate similar to the form given in Annex C;
    - or
  - in the case of objection:
    - submit a rejection statement listing the remaining items to be completed or defects or deficiencies to be corrected before the mechanical completion status can be accepted.
- k) When the owner rejects the contractor's notice, the contractor shall take any necessary action to complete or correct the items marked and give the owner a subsequent notice of mechanical completion.
- l) The owner shall sign either a completion certificate or shall issue a rejection statement within an agreed period after the date of any subsequent notice of mechanical completion.
- m) Upon acceptance of the mechanical completion certificate of the last part/section/unit/facility of the plant by the owner, the owner shall, within an agreed period, accept the relevant issued mechanical completion certificate for the plant similar to the form given in Annex C.

## 7 Commissioning

### 7.1 General

After the owner has issued a mechanical completion certificate for a part/section/unit/facility of the plant, the commissioning activities listed in AC1 7.2 AC1 shall be carried out as far as possible to enable the start-up and/or start of production.

The documents to be used are listed in Annex A.

### 7.2 Procedure

- a) Commissioning shall be carried out in the following sequence:

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- warming up or cooling down;
  - initial running using test media such as water or other inert substances;
  - operability adjustment;
  - feeding in;
  - stable operation;
  - loading up to the design capacity;
  - final adjustment.
- b) At all stages of the commissioning sequence, the plant shall be operated at optimum and in safe plant conditions. To ensure this, the contractor may make adjustments to the condition indicated in the operating manual and process flow diagrams as necessary.
- c) The contractor shall specify for each discrete part of the plant the operational data to be recorded and the manner in which the data is to be taken.
- d) All the operating data shall be recorded by the owner on the predefined forms to be mutually agreed upon. A copy of the operating log and analytical data from the initial operation through to the completion of the performance test shall be made available by the owner to the contractor for evaluation.
- e) When any part of the plant is pressurized or placed in hot alignment, regular checking on thermal expansion, vibration, noise and the like shall be performed by the contractor.
- f) The detailed methods and procedures for each of the commissioning tests and operations shall be specified by the contractor in the operating manual or issued to the owner as additional work procedures.
- g) The contractor shall arrange for the presence of the vendor's and the licensor's representatives at the site to assist the contractor's personnel, wherever necessary.
- h) The contractor's construction personnel appointed for precommissioning should remain on site to carry out any necessary adjustment and remedial work.
- i) All changes and modifications applied during commissioning shall be documented.

AC1 *Text deleted* AC1