

BEFORE THE SCAN

Pre-scan readiness checklist

Scanning is non-contact and does not interrupt production, but a scan can only record what the scanner can see from where it stands. Most of what makes a visit short and the data complete is decided before anyone arrives. Work through this with whoever runs the area.

SITE / AREA

PREPARED BY

DATE

AGREE THE SCOPE

Settled in advance, this is what the proposal and the billable area are based on.

- ☐ **Mark the area on a plan.** Outline exactly what is to be captured, and count each floor, mezzanine, and platform that needs separate capture. This marked plan is what the billable area is measured from.
- ☐ **Say what the data is for.** Laying out new equipment, routing a conveying line, checking clearances, or building a drawing package — the purpose decides how densely an area is scanned and how much of it is modeled.
- ☐ **Name the systems that matter.** For process modeling, agree which piping systems are in scope and the minimum pipe size to model, before quoting. Insulated lines need their nominal size confirmed; the outside diameter of insulation does not establish it.
- ☐ **Flag fabrication-critical dimensions early.** Tie-ins, flange faces, anchor bolts, and tight clearances need separate verification before anything is fabricated or installed. Say so up front so the right method is quoted rather than discovered later.
- ☐ **Confirm deliverable formats.** One point-cloud format, the native model files, an agreed exchange format, and the software versions they must open in. Agreeing versions now avoids a re-export later.

SORT OUT ACCESS

Access is the single most common reason an area comes back with gaps in it.

- ☐ **Give us a site contact.** One person who knows the area, can open doors, and can answer questions on the day.
- ☐ **Book the site induction.** If your site requires a safety orientation, contractor check-in, or sign-in system, schedule it so it happens before the scanning window rather than inside it.
- ☐ **List the PPE required.** Hard hat, safety glasses, hearing protection, steel-toe boots, hi-vis, and anything specific to your plant such as hairnets, beard nets, or food-safe clothing in production areas.
- ☐ **Arrange keys, badges, and escorts.** Electrical rooms, mechanical rooms, roofs, and restricted areas usually need an escort. If one is only available for part of the day, say which part.
- ☐ **Identify anything needing a lift or scaffold.** High structures, roof geometry, and overhead pipe racks may need a lift to capture properly. Lifts, escorts, extra personnel, and precision verification are quoted separately, so identify them before the visit.
- ☐ **Identify confined spaces.** Vessel, silo, bin, and duct interiors are treated as separate work with their own permits and procedures. They are not part of a standard scanning scope.
- ☐ **Plan where to park and unload.** The scanner travels on a cart with a tripod and cases. A dock, a service door, or a route that avoids stairs saves real time on a large building.

COMPANY

Davis Design Group LLC
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DOCUMENT

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SHEET

DDG-250
Rev A · Not to scale

GET THE AREA READY

An hour of housekeeping usually buys back more than an hour of scanning.

- ☐ **Clear the walking routes.** The scanner is set up roughly every few metres in congested areas. Aisles clear of pallets, hoses, and cords mean more setups per hour and fewer shadows behind obstructions.
- ☐ **Move what is not staying.** Temporary pallets, carts, totes, and stock in front of equipment become permanent-looking geometry in the point cloud. Anything moved out is one less thing to explain later.
- ☐ **Open what you want captured.** Panel doors, access covers, and enclosure doors only appear inside if they are open when the scanner is there. Hidden components and equipment internals are outside standard scope.
- ☐ **Point out dark or cramped corners.** Range measurement does not need light, but the colour photography does. Areas with no lighting can be captured in monochrome or lit temporarily — worth deciding in advance.
- ☐ **Note reflective and awkward surfaces.** Polished stainless, glass, wet or dark rubber, and anything seen at a glancing angle return noisier or missing points and may need extra setups. Knowing where they are helps plan the setups.
- ☐ **Schedule around steam, dust, and washdown.** Airborne dust, steam, and spray put points where there is no object. A window when they are off produces cleaner data than any amount of cleanup afterwards.

PICK THE WINDOW

Scanning can run during production; picking the moment still improves what comes back.

- ☐ **Give notice.** Five working days before the start date is the normal request, so the visit can be scheduled properly.
- ☐ **Consider a down day or an outage.** A planned outage, a shift change, or a weekend gives clear access to areas that are normally occupied, and to equipment that is normally guarded or running.
- ☐ **Say what will be running.** Moving people and forklifts are filtered out automatically. A running line is not: whatever it hides stays hidden, and product in a hopper is captured as though it were the hopper.
- ☐ **Allow for the walk-through.** A short walk of the area before the first setup, with someone who knows it, consistently saves more time than it costs.

HANDLE THE PAPERWORK

Worth checking early, because these are the things that delay a start date.

- ☐ **Request the certificate of insurance.** Standard contractor liability and workers' compensation coverage is carried. If your site needs a certificate naming you, or specific limits, ask early — special insurance and permits are billed as extra.
- ☐ **Send any NDA before the visit.** If plant data is confidential, get the agreement signed ahead of the day rather than at the gate.
- ☐ **Confirm photography is allowed.** The scanner records calibrated panoramic photographs along with the measurements, and they are part of the deliverable. Restricted-photography areas need to be agreed in advance.
- ☐ **Share existing drawings and plant north.** Old plans, a column-line grid, or an agreed north arrow give the model and the drawings the same orientation and naming your site already uses, even when the drawings themselves are out of date.

KNOW WHAT HAPPENS AFTER

What arrives, and what to check when it does.

- ☐ **Read the coverage summary.** Every project comes with a written summary of what was captured and what was not, including anything that could not be reached or was obstructed on the day. Read it against your marked-up plan.

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- ☐ **Check the registration result.** Scans are tied together on site and refined afterwards, and the result is checked as part of quality control. Ask about anything in the summary you do not recognise.
- ☐ **Treat models as interpretations.** A point cloud is measured data. Models and drawings are interpretations of it at an agreed level of detail, so modeled geometry is only as precise as the modeling scope says it is.
- ☐ **Verify before fabricating.** Before anything is cut, drilled, or ordered to a dimension taken from the data, confirm whether that dimension is fabrication-critical and needs separate verification.

One thing that cannot wait until afterwards

Fabrication-critical tie-ins, flange locations, anchor bolts, and tight-clearance dimensions need separate verification before fabrication or installation, quoted separately.

Questions on any of this: Jason Davis answers them directly. Nothing here is a requirement for a quote — send what you have and the rest can be worked out together.

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