FACILITIES MANAGEMENT
610 EQUIPMENT & FACILITIES

U611: Equipment Search
U611 EQUIPMENT SEARCH

SUBJECTS COVERED IN THIS UNIT:

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To manage our large inventory of equipment, FM classifies equipment into groups, types and keywords within an equipment structure based on UniFormat.

The equipment structure diagram is a reference document used for:
1. Assisting with locating equipment records in COMPASS
2. A guide to set up new equipment records in COMPASS
3. A guide to create new varieties of equipment in COMPASS

*FM Equipment Structure Diagram can be found on*
http://www.fcm.umn.edu/employees/forms/equipment-data/index.htm
Equipment is not inventoried at this level.
EQUIPMENT WORKBENCH

• What is an Equipment Workbench?
  • A COMPASS form that displays lists of equipment
  • Quickest way to view lists of similar equipment

• What can I do with the Equipment Workbench?
  • Create folders/views of grouped equipment, which is something like a stored query that you can repeat
  • Create Service Requests from an equipment record
  • View basic equipment details
  • View Work Order history for equipment
Access the Equipment Workbench from various locations:
1. The Navigator screen
2. From the Work Order form
3. From the Service Request form
• **Equipment Workbench Fields**

  1. **Equipment**: Unique identifier of a piece of equipment; first (3) digits identify the building number where the equipment is located.
2. **Group**: Major equipment group
3. **Type**: Breaks the group into further elements
4. **Keyword**: Specifies what the equipment is

*FM Equipment Structure Diagram can be found on http://www.facm.umn.edu/employees/forms/equipment-data/index.htm*
5. **Location information**: where the equipment is physically located
6. **Nomenclature**: Description of what the equipment is and what it serves
7. **Status**: Operational status of the equipment
   - **ONLINE**: Active, operational piece of equipment
   - **INFO**: Equipment no longer exists or has been physically removed; data is saved for historical purposes
   - **INVALID**: Waiting for customer EFS account
   - **OFFLINE**: Equipment temporarily out of service; will be put online at a later date
8. **Acquisition Date**: Date the equipment was bought; used for recording and flagging equipment under warranty

9. **Base Usage**: Generally not used; sometimes for meters

10. **Last Usage**: Generally not used
EQUIPMENT WORKBENCH

• Function Buttons

11. **View**: Accesses the Equipment form which provides equipment data, specification data, PM scheduling data, acquisition/warranty data, readings, and alias which is not used. Equipment data and PM schedules are modified from this form.

12. **WO History**: Lists work orders written to the equipment

13. **Statistics**: Reliability measures currently not being used, but work order summary statistics appear for PMs, Service Requests and Project Phases.

14. **Bills of Mat’l**: If a BOM file (repair parts that can be ordered for a piece of equipment) was assigned to the equipment, it will appear here.
EQUIPMENT WORKBENCH
EQUIPMENT WORKBENCH

• Function Buttons continued...

15. **Specifications**: Equipment specification data for the selected equipment record

16. **Status History**: Status history and dates the status was modified for the selected equipment

17. **WO Backlog**: Opens Current Schedule form and lists active work orders written against the selected equipment

18. **Create SR**: Opens a blank Service Request form ready for data entry; selected equipment number is auto-filled in the Equipment field

19. **View SR**: Opens Service Request form. All Service Requests written against the selected equipment can be scrolled through by utilizing the **pg dn** or **pg up** keys or by performing a query.
• **Hierarchy Tab**
  
  20. Locate equipment by drilling down (clicking + sign next to equipment)
  
  21. When the equipment number is located, use buttons on the right to perform further functions
Exercise 1

1. From the Equipment Workbench form, press the F7 key or click the Enter Query icon
2. In the Keyword field enter %CHIL%
3. In the Building field enter 142
4. In the Status field enter ONLINE
5. Execute the query by pressing the **F8** key or the Execute Query icon.

6. How many pieces of equipment appear?
Access the Equipment form from various locations:

1. Navigator screen
2. Service Request and Work Order Forms by right-clicking the equipment number and selecting Edit from the right-click menu
3. Equipment Workbench by selecting View
The Equipment form provides much more detail for a piece of equipment.
EQUIPMENT FORM

• Equipment Tab Fields
  1. **Equipment**: Assigned equipment number and a brief description of equipment
  2. **Parent**: Component of an existing piece of equipment or the group / type that the equipment rolls up to according to Equipment Structure Diagram
  3. **Asset Class**: Used for refrigerant bearing equipment only
  4. **Mfr. No**: Manufacturer name of the equipment
  5. **Mfr Part No**: Manufacturer part number if one exists, also used for:
     • Architect number (i.e. EF-1, PCHW-12)
     • A special designation that can be easily queried (i.e. BSL3)
     • Old Equipment number if number was changed
  6. **Model**: Model number of the equipment
  7. **Serial No**: Serial number of the equipment
  8. **Site**: 01 = Minneapolis Campus, 02= St. Paul Campus
  9. **Building, Floor, Room**: Physical location of the equipment
  10. **Zone**: FM District where the equipment is physically located
### EQUIPMENT FORM

#### Manufacturer
- **Mfr No.**: TRANE
- **Mfr Part No.**: SEASONAL
- **Model**: RAUB-1503-A
- **Serial No.**: 78G-09314

#### Location
- **Site**: 01
- **Building**: 074
- **Floor**: 01
- **Room**: B155
- **Zone**: HEALTH SCI

#### General Information
- **Assessment Date**: 
- **Service Guide**: 0
- **Status / Condition**: ONLINE
- **Rental Type**: 
- **Rental / Mileage Rate**: 
- **Replacement Cost**: 
- **Overall Rating**: 

#### Keywords
- **Keyword**: COND UNIT
- **Type**: PACKAGESYS

#### Equipment Group
- **Equip Group**: HVAC SYS
- **PM Group**: COND UNIT

#### Criticality
- **Criticality**: 4
EQUIPMENT FORM

11. **Keyword:** Describes what the equipment is
12. **Type:** Sub-category of the equipment group
13. **Asset No:** Not being used by FM
14. **Equipment Group:** Broadest category the equipment fits into according to the equipment structure diagram
15. **PM Group:** A group of PMs that correspond with the equipment Keyword. When the PM Group is selected, the PMs automatically populate the PM tab so they can be scheduled.
16. **Criticality:** The criticality of the equipment
   - 1 – FLS Equipment & Critical Equipment (i.e. fire suppression systems, generators, eyewashes)
   - 2 – Important Equipment - affects teaching and research (i.e. processed cooling chillers, compressors)
   - 3 – Moderately Critical Equipment (i.e. supply fans)
   - 4 – Low Critical Equipment - insignificant affect on University operations (i.e. hallway unit heater)
   - 5 – Non Critical Equipment - no affect on University operations (i.e. bathroom exhaust fan)
   - 21 – Telecomm FLS equipment.
   - 22 – Telecomm other equipment
# EQUIPMENT FORM

<table>
<thead>
<tr>
<th>Equipment</th>
<th>074-CDUT01</th>
<th>SERVES DX COIL IN SUP009; LOC IN WINDOW WELL OUTSIDE B155</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent</td>
<td>073-PACKSYS</td>
<td>PACKAGE AND TERMINAL SYSTEMS (FOR INFORMATIONAL PURPOSES ONLY) ...</td>
</tr>
<tr>
<td>Asset Class</td>
<td>REFRIG SYSTEMS</td>
<td>REFRIG SYSTEMS</td>
</tr>
</tbody>
</table>

### Manufacturer
- **Mfr No.** TRANE
- **Mfr Part No.** SEASONAL
- **Model** RAUE-1503-A
- **Serial No.** 78G-09314

### Location
- **Site** 01
- **Building** 074
- **Floor** 01
- **Room** B155
- **Zone** HEALTH SCI

### Description
- **Keyword** COND UNIT
- **Type** PACKAGESYS
- **Asset No.**
- **Equip Group** HVAC SYS
- **PM Group** COND UNIT
- **Critically** 4

### General Information
- **Assessment Date**
- **Service Guide**
- **Status / Condition** ONLINE
- **Rental Type**
- **Rental / Mileage Rate**
- **Replacement Cost**
- **Overall Rating**

![Image of Equipment Form](image-url)
17. **Status (the only field in the General Information area that is being utilized):** The status of the equipment

- **ONLINE:** Active, operational piece of equipment
- **INFO:** Equipment no longer exists or has been physically removed; data is saved for historical purposes
- **INVALID:** Waiting for customer EFS account
- **OFFLINE:** Equipment is temporarily out of service; will be put online at a later date
EQUIPMENT FORM

[Image of equipment management software interface]

18. Manufacturer
19. Location
20. General Information
21. Description
22. Equipment Details
23. Additional Information
EQUIPMENT FORM

18. **Accounts**: The default account number assigned to the piece of equipment for which work orders will be charged

19. **WO History**: Lists the work orders written against the equipment in order by date completed

20. **Dates**: Lists the dates that the equipment record was entered, modified, closed, last note date and by whom

21. **Audit**: Lists the modifications made to the equipment record, which fields were changed, what was changed, the date of the change and by whom

22. **Attributes**: Lists the refrigerant attributes for Refrig Sys equipment numbers with Refrig Type

23. **Lifecycle**: Not used at this time
EQUIPMENT FORM (TABS)
24. **Specifications Tab**: Create, view, or modify an extensive specification list for the equipment record

25. **PMs Tab**: Schedule, view, or modify the PM schedule for the equipment record

26. **BOMs Tab**: Create, view, modify, or delete a BOM (bill of materials) for the equipment record

27. **Acquisition Tab**: Create, view, or modify warranty information for the equipment record

28. **Readings Tab**: Not being used by FM

29. **Alias Tab**: Not being used by FM
EQUIPMENT FORM QUERY

Exercise 2

1. Access the Equipment form from the Navigator screen
2. Query for all building 143 exhaust fans that are ONLINE
3. How many pieces of equipment were retrieved?
4. Hint: Click the Last ➤ icon