U612 BUILDING EQUIPMENT MANAGEMENT

SUBJECTS COVERED IN THIS UNIT:

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UPDATING EXISTING EQUIPMENT

- When does equipment need updating?
  1. Equipment or component (i.e. motor) has been replaced
  2. Equipment removed or placed temporarily offline
  3. Existing data is incorrect

- Who submits the changes?
  1. Supervisors
  2. Outside Contractors
  3. Project Coordinators
  4. U Services Construction
  5. Equipment Inventory Specialist
UPDATING EXISTING EQUIPMENT

- Equipment changes are communicated via Equipment Data Forms, verbally, or with a note or email from Team Managers, Line Staff, U Services Construction, Project Coordinators, CPPM Staff, Energy Management Staff, and outside contractors.

- Equipment Data Forms are located at: [http://www.facam.umn.edu/employees/forms/equipment-data/index.htm](http://www.facam.umn.edu/employees/forms/equipment-data/index.htm)

- Changes are submitted to the Planner/Scheduler for entry into COMPASS.
Access the Equipment form from the Navigator screen
Query the equipment number that requires updating
Change the data on the Equipment form as needed
Update the equipment notes
Intentionally Left Blank
UPDATING EQUIPMENT SPECIFICATIONS

1. Full Description:

   140-ALRM00 - SERVES BUILDING, MAIN PANEL LOCATED IN STAIRWAY #3 NEAR ENTRY ON SOUTH SIDE OF BUILDING.
   140-SUPP00 - SERVES BASEMENT AREAS, WET SYSTEM MAIN VALVES LOCATED IN ROOM 65A. FD

2. Specification Type:

   - FIRE ALARM SYSTEM
   - MAIN FACP MFG / MCF
   - ADDRESSABLE
   - BATTERY BACK UP
   - BATTERIES (# OF)
   - BATTERY CHARGERS
   - BATTERY VOLTAGE
   - BATTERY AMP/HOUR

3. Numeric Specification:

   - ALRM00
   - NOTIFIER / AFP200
   - Y
   - Y
   - 24.0
   - 7.2

4. Display Order:

   - 1
   - 2
   - 3
   - 4
UPDATING EQUIPMENT SPECIFICATIONS

- **Specifications Tab**
  1. **Full Description**: Field length is 32,000 characters; only appears on Equipment form
  2. **Specification Types**: These are auto-populated when equipment is entered into COMPASS. To add a Spec Type, go to an empty field and press F9 then select a Spec Type. To delete a Spec Type, put your cursor on a Spec Type and click the delete icon
  3. **Textual Specification**: Enter the specification data; cannot be left blank
  4. **Display Order**: Can be changed by entering a number
ADDING EQUIPMENT NOTES

- Equipment Form Standard Note Titles (Update notes whenever a change is made to an equipment record)

1. **SERVES/INTERLOCKED INFORMATION**: Use when information on the equipment short description exceeds the character limit. *Check print box.*

2. **LOCATION INFORMATION**: Used for additional location information and/or when equipment is not located in a room. **Use asterisks** and check print box.

3. **SPECIAL INSTRUCTIONS**: Use to provide detailed direction needed to perform work on a piece of equipment (i.e. need 8 ft ladder, biohazard area, special tools, special key.) **Use asterisks** and check the print.

4. **EQUIPMENT NOTES**: Use when note doesn’t fit under other note categories and needs to be printed on work orders. **Use asterisks” and check the print box.**

5. **OTHER EQUIPMENT INFORMATION**: Use when modifying a piece of equipment. *Do not check the print box.*

6. **PM MODIFICATIONS**: Use when modifying a PM task attached to piece of equipment. *Do not check the print box.*
Intentionally Left Blank
Exercise 1

Scenario: Unit will be shut down temporarily and will be replaced with a new unit. New fan coil will be installed on the wall, rather than the ceiling.

1. Query for equipment number 147-FNCL003
2. Change the equipment Status field to OFFLINE

3. A warning will appear that all PMs will be suspended; click OK so no PM work orders are generated while the equipment is OFFLINE
4. Click the Attachments icon to access the equipment notes
5. Create a new note by clicking the New.. button
6. Enter the note title OTHER EQUIPMENT INFORMATION
7. In the Text field enter when the change occurred, what was changed, why it was changed, who requested the change, and your initials
8. Click OK to save the note
9. The Note Date, User, and Source fields will auto-populate
Scenario continues: Equipment has been replaced on the wall and is back online

10. Change the Mfr No, Mfr Part No, Model, and Serial No fields to reflect the new equipment data

11. Change the Status field to ONLINE
12. Go to the PMs tab
13. Make sure the PMs are active and have been scheduled correctly (this process is covered in section U621)
14. Update the notes by clicking the Attachments icon
15. A 6’ ladder is no longer needed to reach this equipment
16. Place your cursor on the SPECIAL INSTRUCTIONS note title and click View...
17. Click the Delete icon to delete the entire note
18. Modify the EQUIPMENT INFORMATION note by clicking View...
19. Enter text above the previous note, stating what was changed, why, who requested the change, and your initials
20. Click OK to save the updated note
Exercise 2

Scenario: 142-RPZ063 was replaced by an Apollo, Model RPA4, 1.0”, S/N 530893

1. Query up equipment record 142-RPZ063
2. Make changes to the Mfr No, Mfr Part No, Model No, Serial No fields
3. Click the Specifications tab to change the valve size
4. Click the Acquisition tab and update the Warranty information
5. Click the Attachments icon to access the notes
6. View the OTHER EQUIPMENT INFORMATION note
7. Update the note text with when, what, why, who and your initials
Equipment changes are communicated via Equipment Data Forms, verbally, or with a note or email from Team Managers, Line Staff, U Services Construction, Project Coordinators, CPPM Staff, Energy Management Staff, and outside contractors.

Equipment Data Forms are located at: [http://www.facm.umn.edu/employees/forms/equipment-data/index.htm](http://www.facm.umn.edu/employees/forms/equipment-data/index.htm)

Changes are submitted to the Planner/Scheduler for entry into COMPASS.
1. Planner reviews COMPASS equipment add/change form for completeness, and contacts form submitter with questions
2. Make sure the equipment record hasn’t already been entered in COMPASS; it’s possible the equipment was already entered but not labeled in the field.

3. Reference the Equipment Structure Diagram located at [http://www.facm.umn.edu/employees/forms/equipment-data/index.htm](http://www.facm.umn.edu/employees/forms/equipment-data/index.htm) for help in determining the appropriate equipment name.
4. Note the next available equipment number \(\text{(Whenever possible, equipment should be numbered from the lowest to the highest floor)}\)

5. Select a similar piece of equipment within the list and view the equipment record
6. Copy the equipment record by pressing the F6 or the Insert icon.
7. Then press the F4 key or the Duplicate icon to duplicate all the information from the record to the new record you are creating.
8. Enter the next available equipment number that you noted previously.
9. Enter serves/location description in the field next to the Equipment field.

10. Modify the parent if needed; refer to the Equipment Structure Diagram at http://www.facm.umn.edu/employees/forms/equipment-data/index.htm
11. Change the Manufacturer data as needed
12. Change the Location information as needed
13. Hint: Click the LOV button next to the field for options
14. Change the Description data: Keyword, Type, Equipment Group, PM Group and Criticality by using LOV button beside each field *(These will not have to be changed if you copied a record similar to the new record being added)*

15. Make sure the equipment Status is ONLINE
17. Standard Specification Types are auto-populated when the equipment keyword is selected.
18. To add a Specification Type, put your cursor on a blank Spec Type field and press the F9 key, then select a Spec Type from the list.
19. Assign the account number by clicking the Accounts... button
20. Select Equipment Acct Group for the Account Group Name field
21. Select ACTUALS for the Billing Type field
22. Click the Accounts button and the Account Details form appears
23. Utilize the Cost Pools document located at http://www.facm.umn.edu/customers/service-levels/index.htm to determine who should pay for maintaining the equipment (FM or Department).

24. If the equip should be billed FM, refer to the Quick Reference: District, Building, Crew, and Default Account Number Combinations Report to determine the account number.
25. Enter the Fund, Dept ID, Account, and Program for the default building account number or enter the account number provided by the customer if the equipment is departmentally funded.

26. Click the OK button to save the account details.
27. Enter 100 in the Percent field unless using multiple account numbers, then use the appropriate percentage
28. To add another account number, click the line below the last account number
29. Click the Accounts button to access the Account Details form
30. Enter another account number and click OK to save
31. Create note titles for information that doesn’t fit on the Equipment form and enter the note text

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6. **PM MODIFICATIONS**: Use when modifying a PM task attached to piece of equipment. **Do not check the print box.**
1. Decide the number of required tags (disconnects are also tagged)
2. Planner prints tags on red labels with white print
3. Tags are printed without the building number
4. Label the equipment and disconnect in a conspicuous place