

## Retire Equipment Desk Instructions

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### 1. Purpose

This procedure provides guidance and direction to Facilities Services personnel when retiring equipment utilizing the Facilities Asset Management Information System (FAMIS). Outlined below are the roles, responsibilities, and step-by-step instructions for entering data.

This Desk Instruction documents the tasks required to **Retire Equipment** records in **FAMIS**

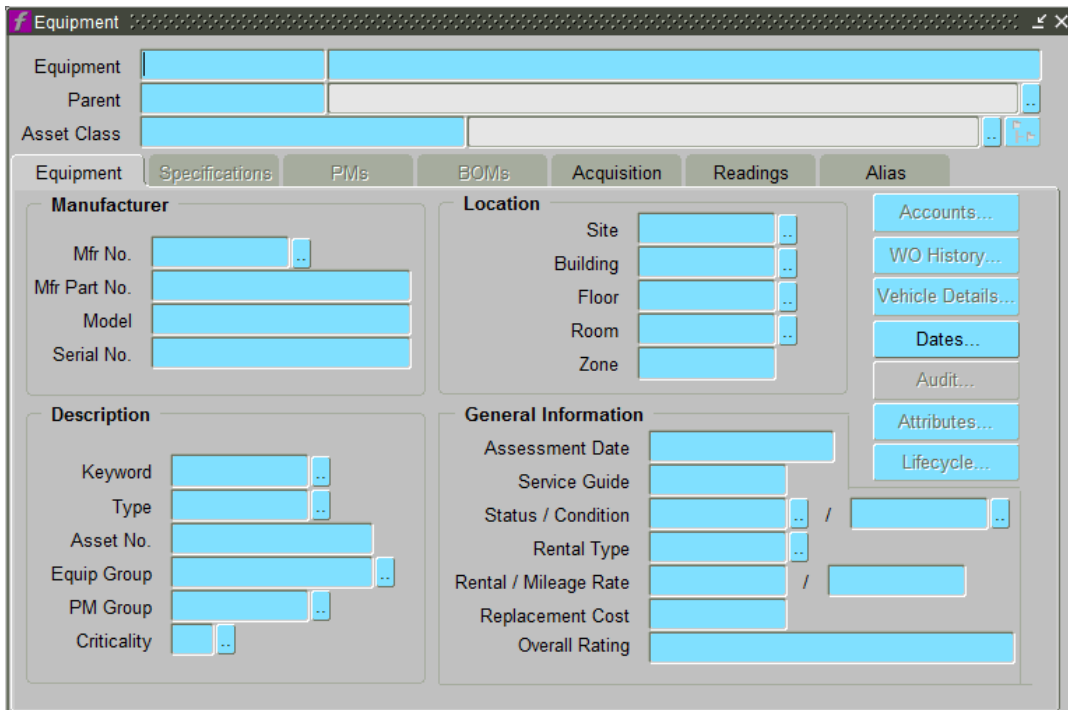
- 1.1** A working knowledge of the **FAMIS FMM Module** and training for the assigned roles is a prerequisite for this desk instruction
- 1.2** The **Equipment Coordinator** role may add, edit, and retire equipment records
- 1.3** The **UT Crew Supervisor** role may edit and retire equipment records

## 2. Equipment Query

2.1 Open the **Equipment** Form

2.2 Enter **Query** mode by selecting the “**Enter Query**” icon  from the header ribbon or press F11

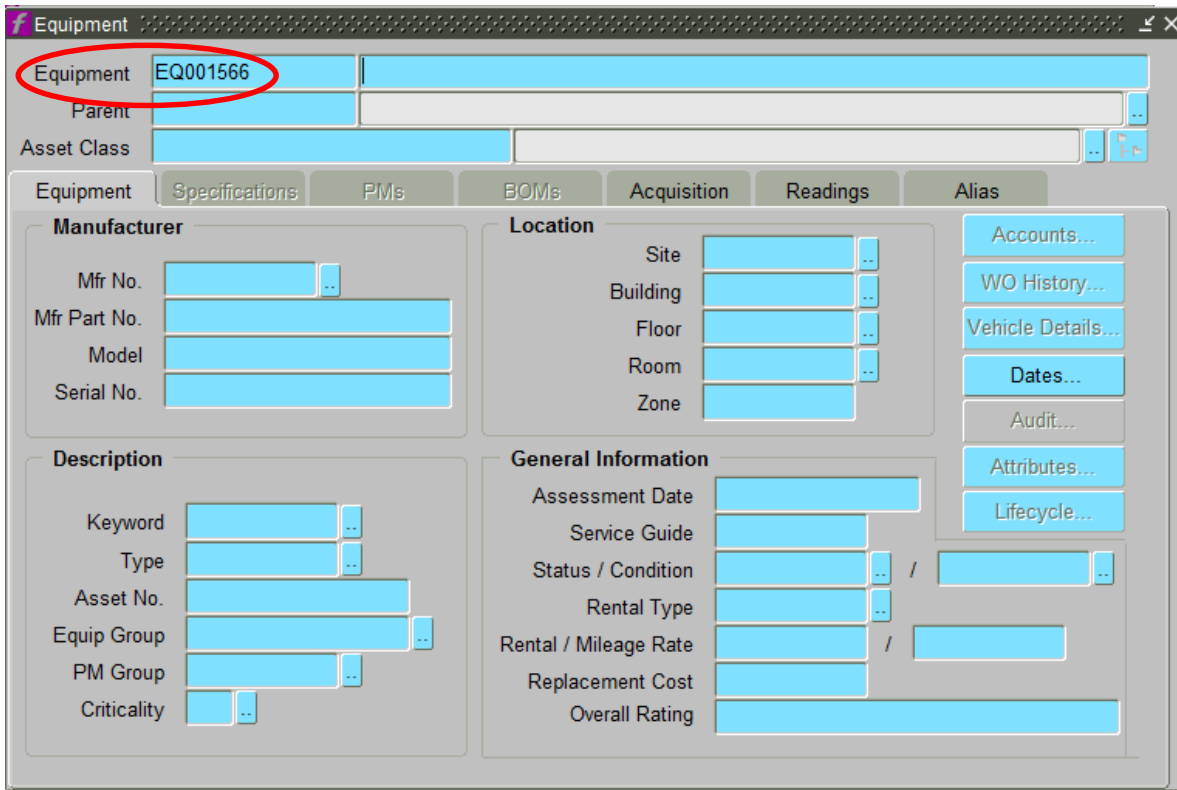
FIGURE 1, EQUIPMENT FORM




The screenshot shows the 'Equipment' form window with the following sections and fields:


- Equipment**: Input field for Equipment ID.
- Parent**: Input field for Parent ID.
- Asset Class**: Input field for Asset Class.
- Tabs**: Specifications, PMs, BOMs, Acquisition, Readings, Alias.
- Manufacturer**: Mfr No., Mfr Part No., Model, Serial No.
- Description**: Keyword, Type, Asset No., Equip Group, PM Group, Criticality.
- Location**: Site, Building, Floor, Room, Zone.
- General Information**: Assessment Date, Service Guide, Status / Condition, Rental Type, Rental / Mileage Rate, Replacement Cost, Overall Rating.
- Buttons**: Accounts..., WO History..., Vehicle Details..., Dates..., Audit..., Attributes..., Lifecycle...

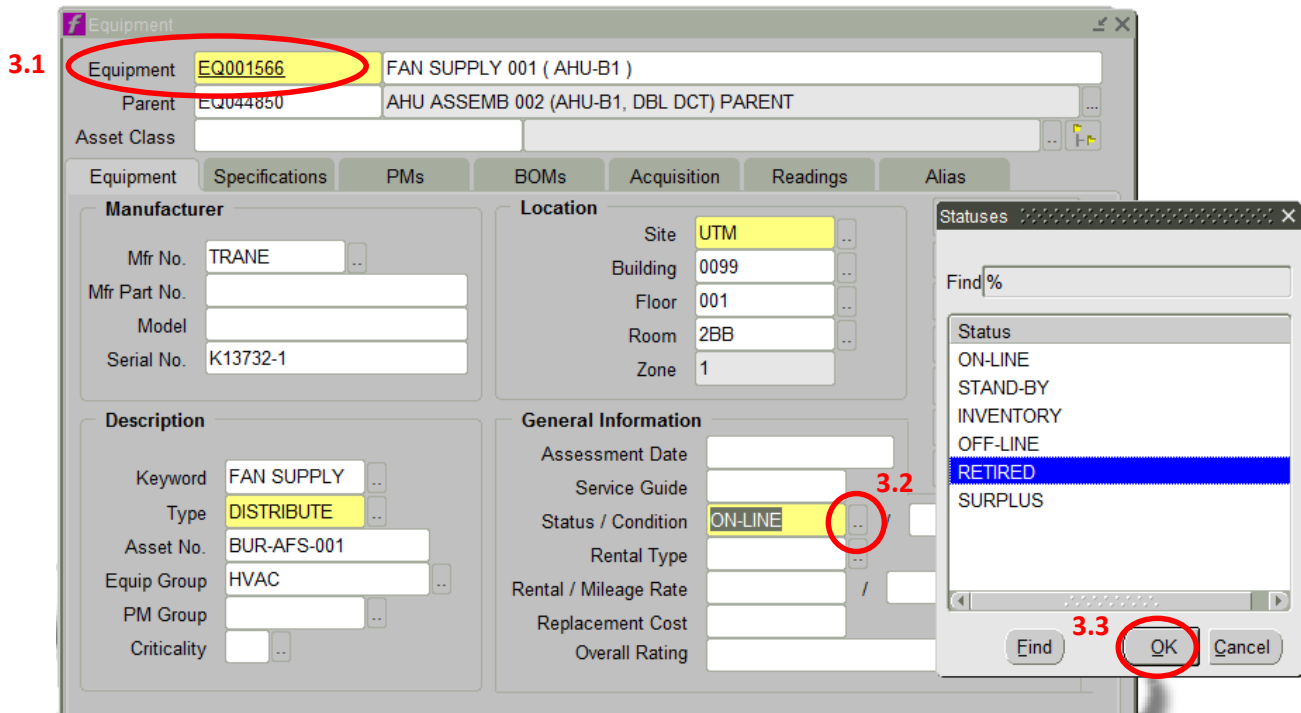
2.3 Type in **Equipment ID** to be retired



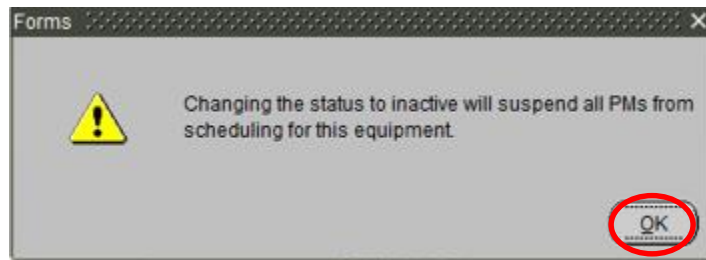
- 2.4 Execute Query by hitting the “Execute Query” Icon  from the header ribbon or press Control F11

### 3. Retire Equipment

- 3.1 Verify this is the precise piece of equipment to be retired
- 3.2 Select the  icon to the right of the Status/Condition field and change to **RETIRED**
- 3.3 Select **OK**



3.4 Expect a **Forms** dialogue box indicating that all PM's are suspended. Select **OK** to accept this change

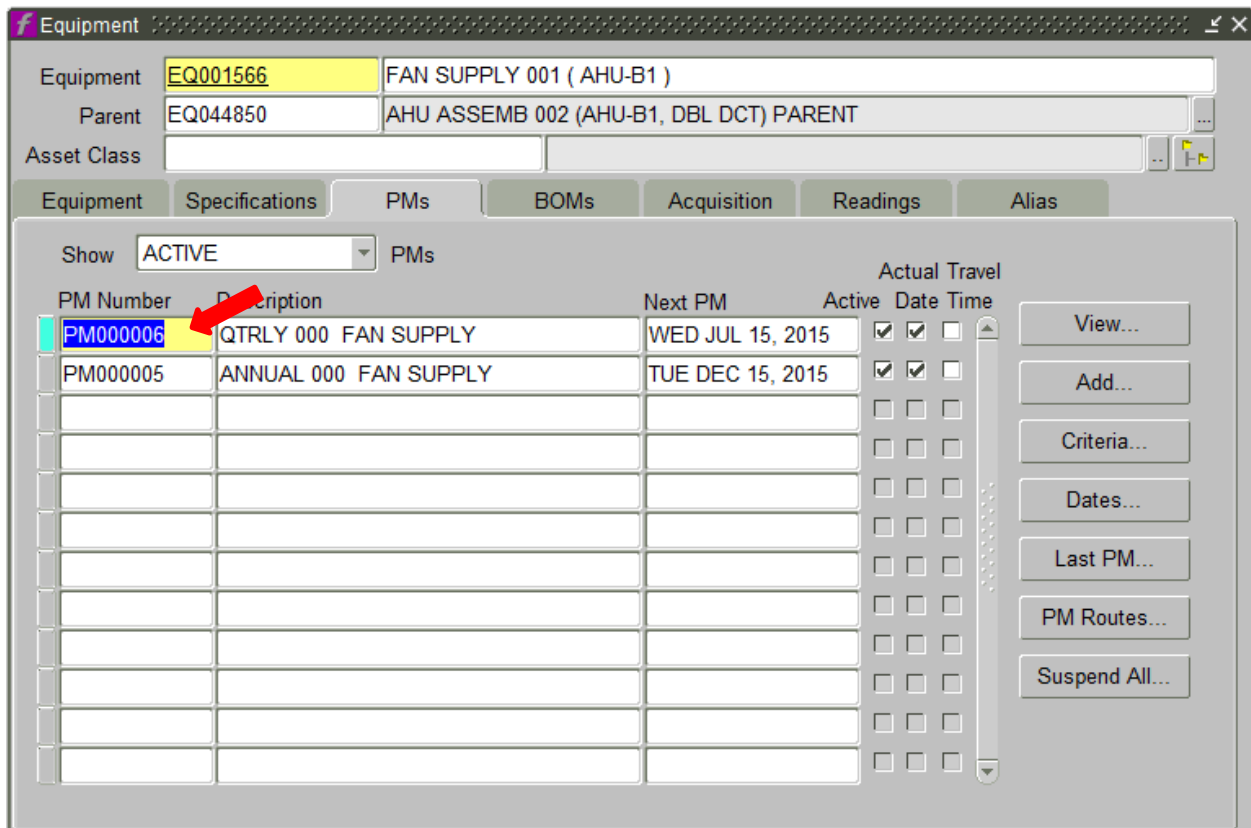


#### 4. Remove all PMs from Equipment

4.1 Select the **PMs** Tab

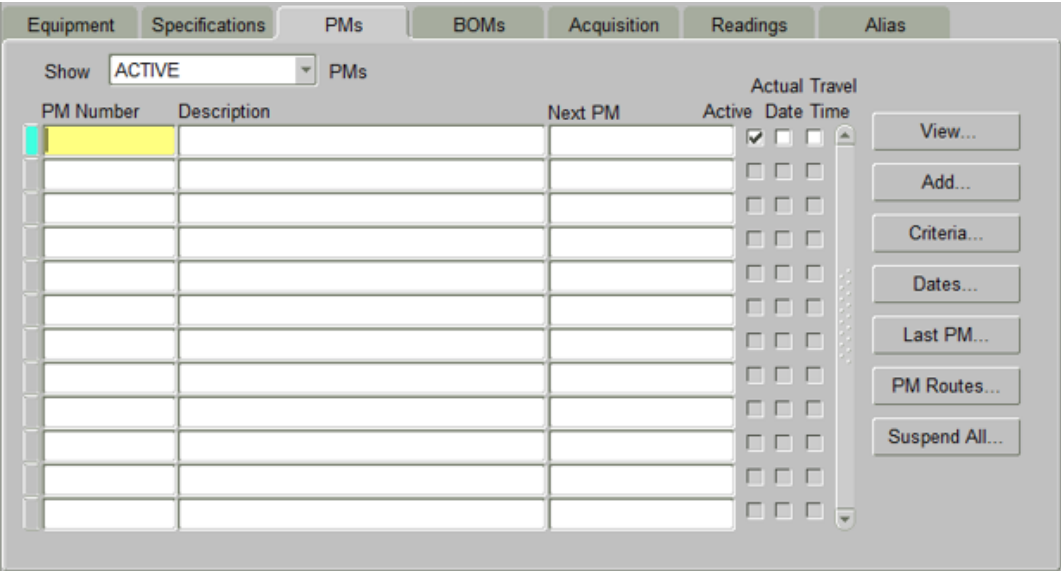


4.2 Place cursor into the **PM Number Field** and left click the mouse to highlight the field with the appropriate **PM number** to be removed. If no PM numbers are listed, this equipment might be on a Route PM - See [Step 5](#).



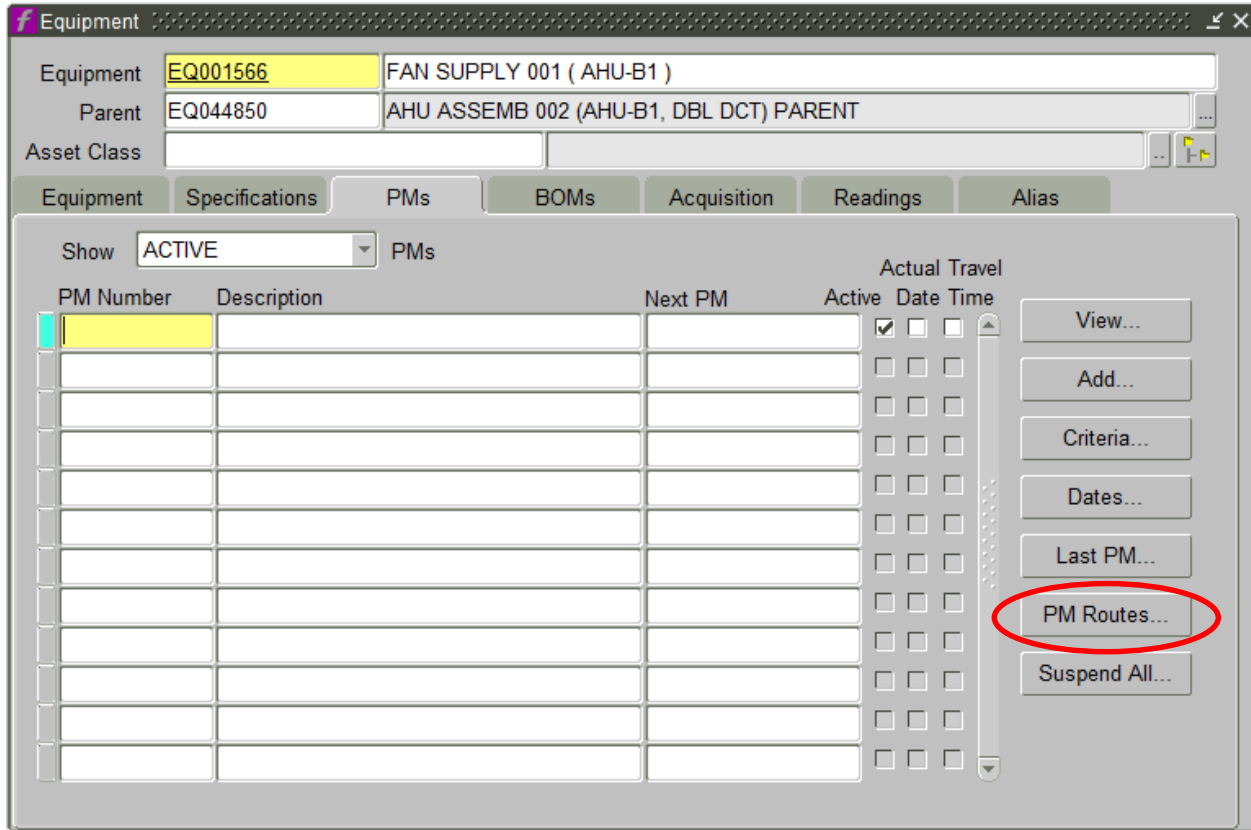
4.3 Select **Delete** icon from the header ribbon

4.4 Repeat for every PM in the screen until all scheduled PMs have been deleted as shown below

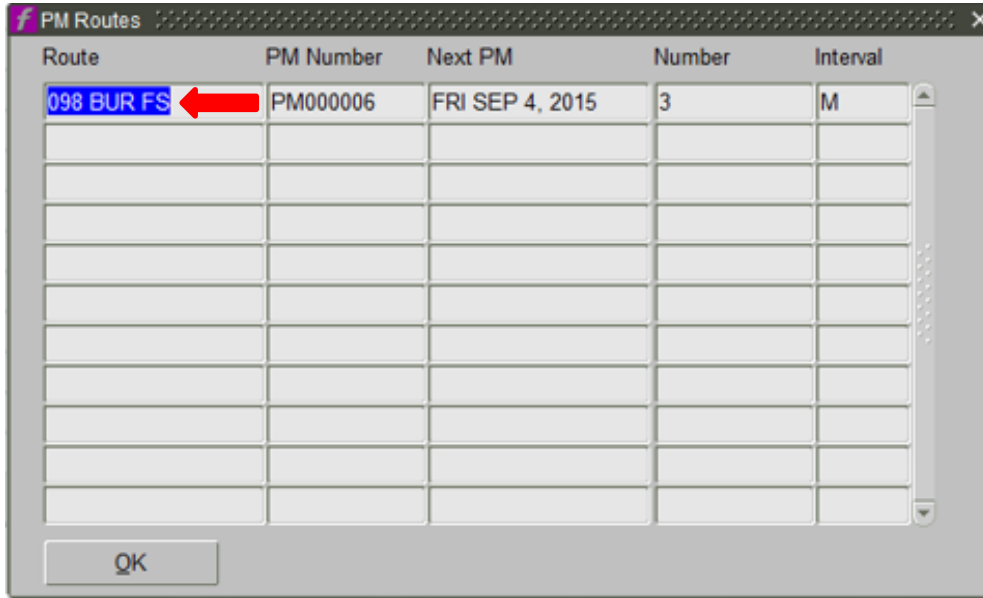


**5. Verify Equipment is NOT on a Route PM**

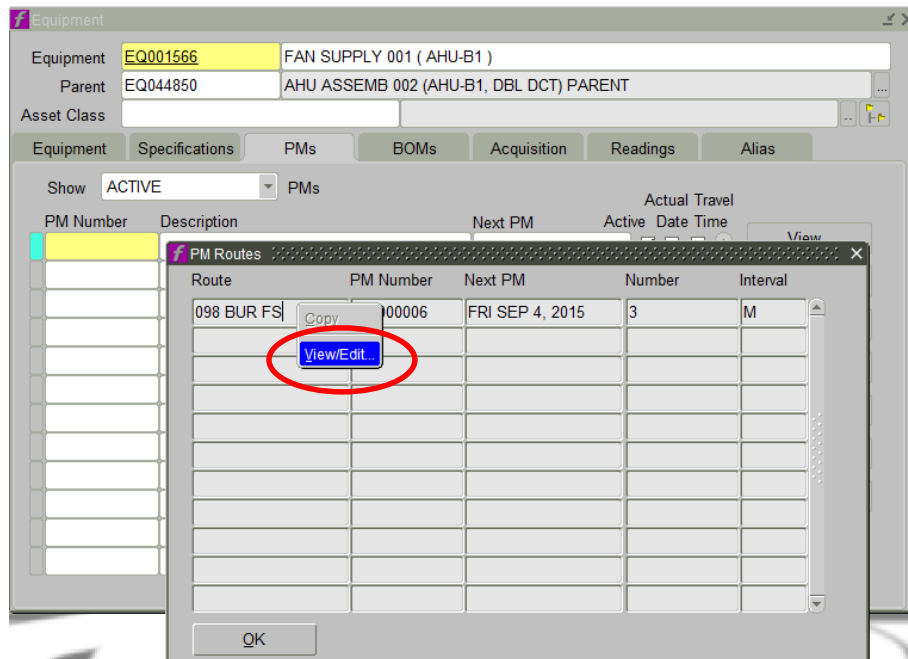
**5.1** Select the **PM Routes** button



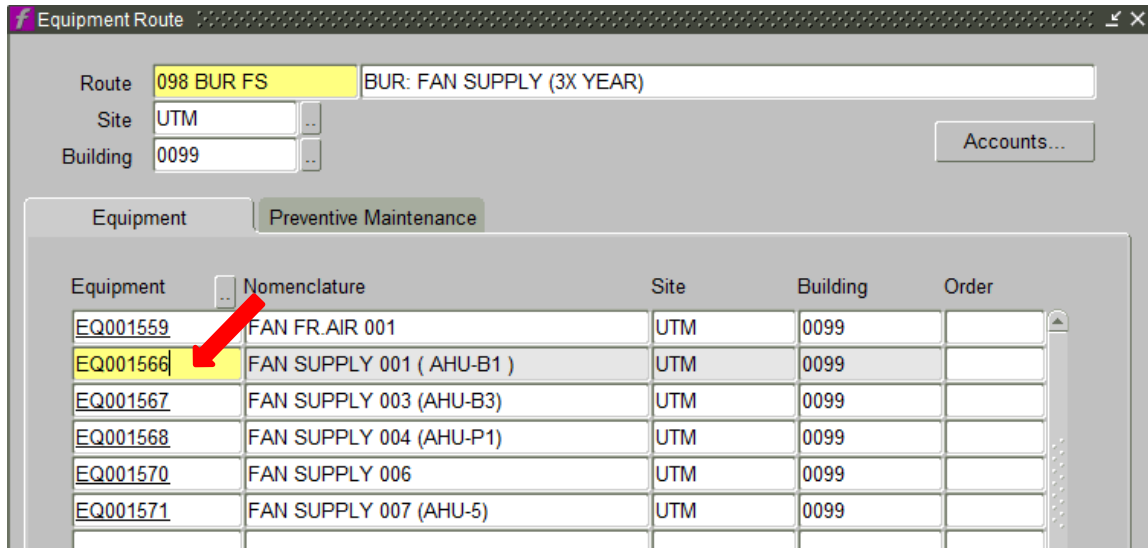
**5.2** Place cursor in **Route** field and left click the mouse to highlight the field if a route is listed



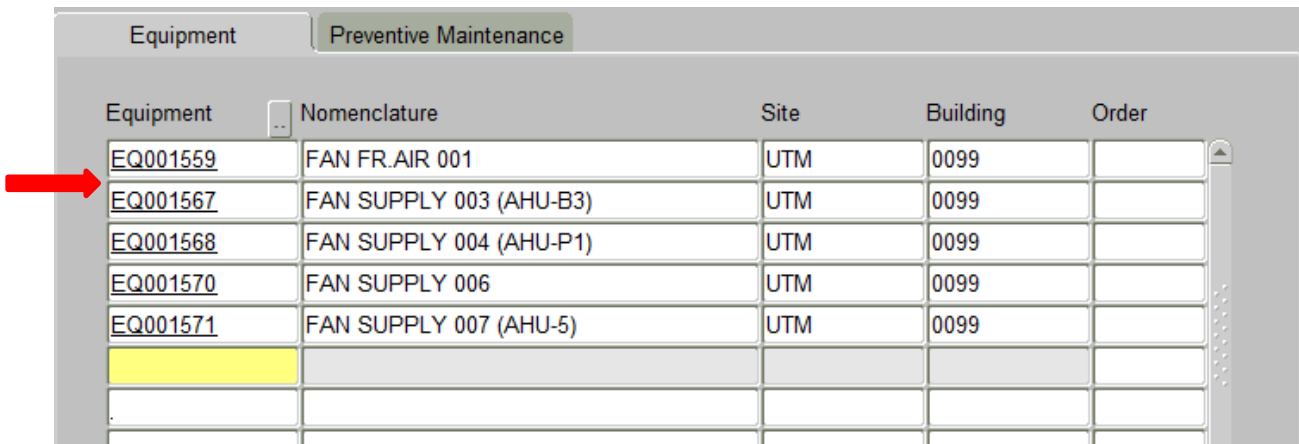
5.3 Right click the mouse to reveal View/Edit, select View/Edit



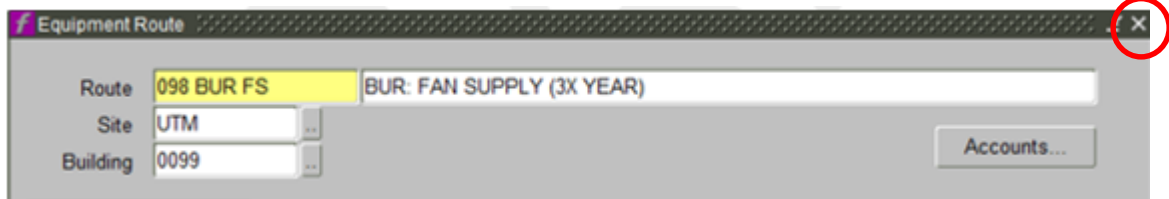
5.4 **IMPORTANT** - Carefully select the correct piece of equipment to be removed from the route by placing cursor in the Equipment field, then left click the mouse to highlight the row



5.5 Select Delete Icon from the header ribbon to delete the equipment from the route  
**IMPORTANT** - Verify the correct piece of equipment has been removed

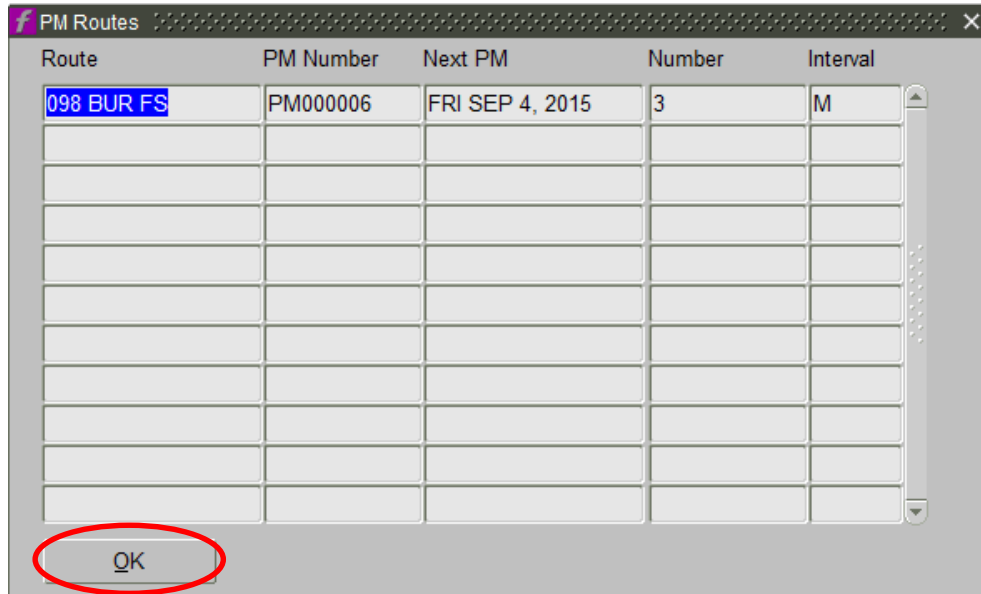


5.6 Close the **Equipment Route** screen by selecting the in the upper right-hand corner

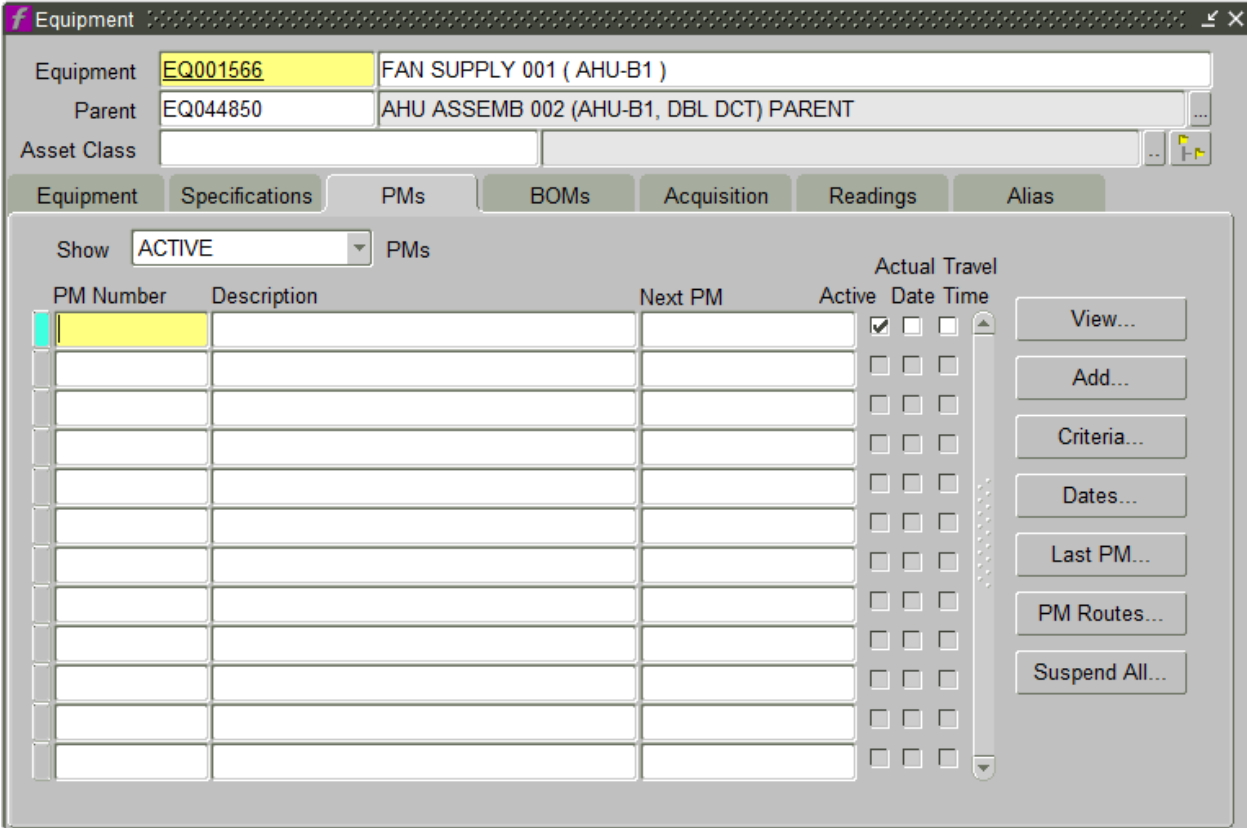


5.7 Click **OK** to close **PM Routes** screen





**5.8** The **Equipment PM** screen should be displayed



**5.9** Click the **Equipment Tab** to display the main screen and verify it is still in retired status

The screenshot shows a software window titled "Equipment" with the following data:

- Equipment:** EQ001566 (highlighted), FAN SUPPLY 001 ( AHU-B1 )
- Parent:** EQ044850, AHU ASSEMB 002 (AHU-B1, DBL DCT) PARENT
- Asset Class:** (empty)
- Manufacturer:** Mfr No. TRANE, Mfr Part No. (empty), Model (empty), Serial No. K13732-1
- Location:** Site UTM (highlighted), Building 0099, Floor 001, Room 2BB, Zone 1
- Description:** Keyword FAN SUPPLY, Type DISTRIBUTE (highlighted), Asset No. BUR-AFS-001, Equip Group HVAC, PM Group (empty), Criticality (empty)
- General Information:** Assessment Date (empty), Service Guide (empty), Status / Condition RETIRED (highlighted), Rental Type (empty), Rental / Mileage Rate (empty), Replacement Cost (empty), Overall Rating (empty)


Buttons on the right include: Accounts..., WO History..., Vehicle Details..., Dates..., Audit..., Attributes..., Lifecycle...

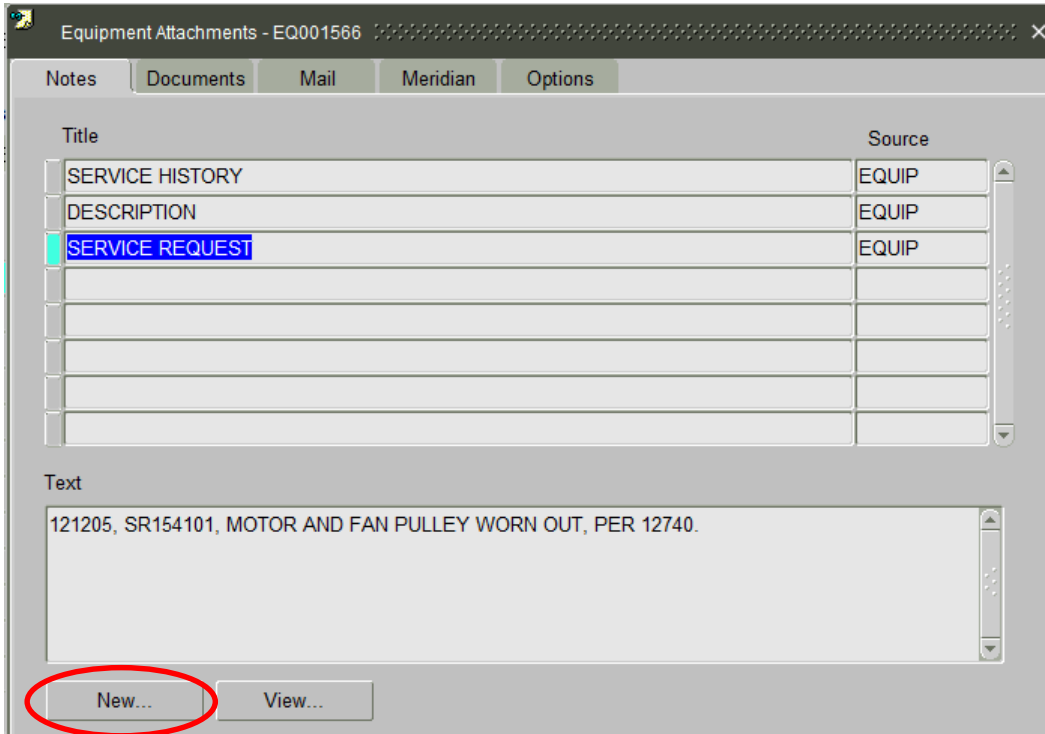
**6. Document the Retirement Justification**


**Note: THIS STEP IS EXTREMELY IMPORTANT TO THE BUSINESS PROCESS.**

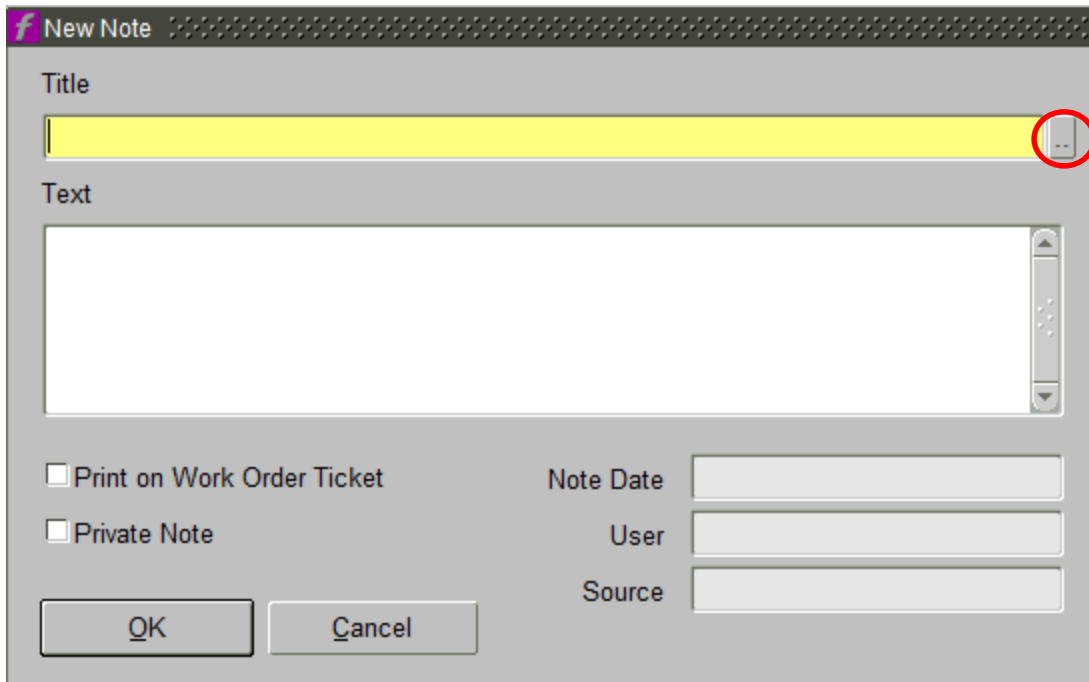
It is necessary to document the following:

- Why this piece of equipment being retired?
- What steps were taken to retire it?
- Was it replaced by another piece of equipment?
- When did it occur?

- 6.1 Select the **Attachments** icon  from the header ribbon
- 6.2 Select **New**

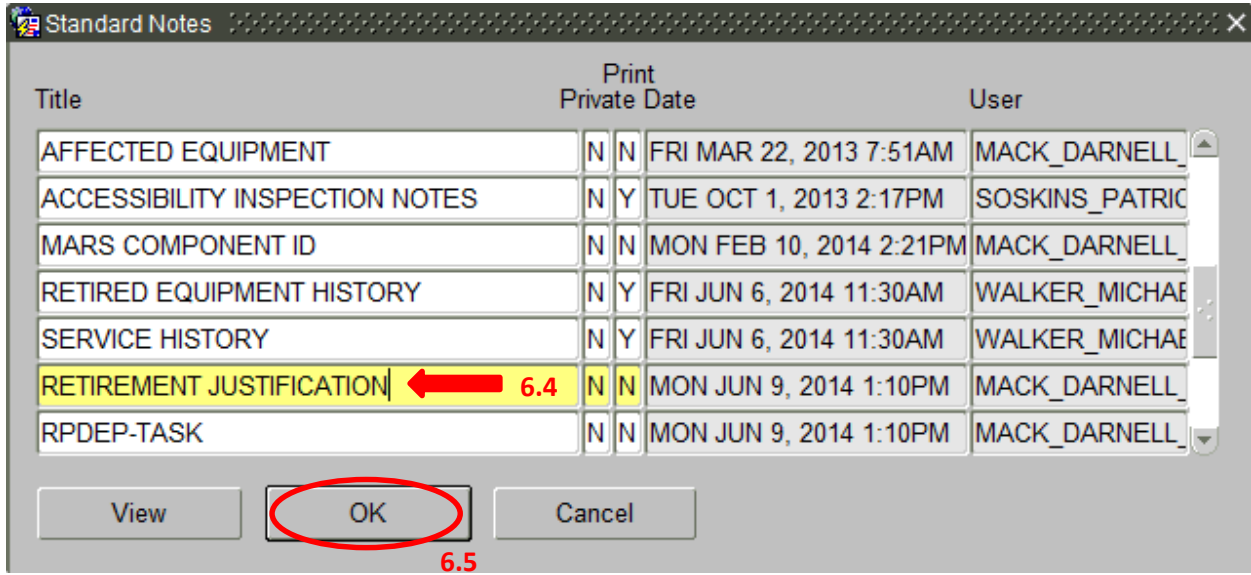


6.3 Open **Title** list of values by selecting the  icon



6.4 Scroll down and place cursor in the **Title** field after the **Retirement Justification** description and **left click** the mouse to highlight

6.5 Select **OK**



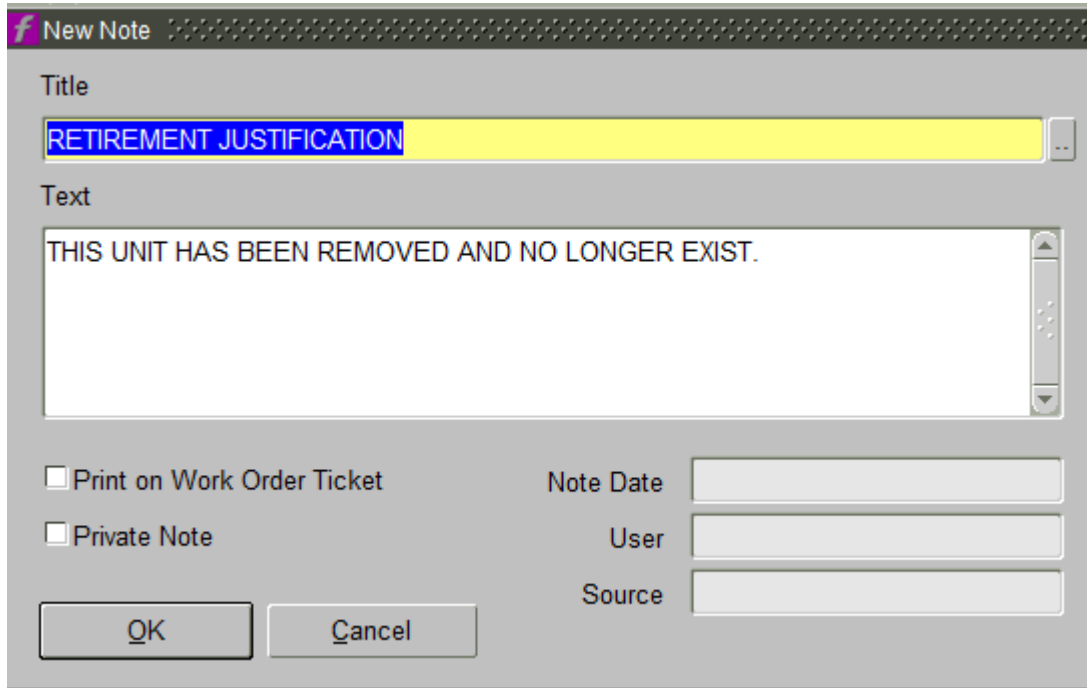
A screenshot of a 'Standard Notes' dialog box. The dialog box has a title bar with a close button. It contains a table with the following columns: Title, Print Private, Date, and User. The 'RETIREMENT JUSTIFICATION' row is highlighted in yellow, with a red arrow pointing to it and the number '6.4' next to it. Below the table are three buttons: 'View', 'OK', and 'Cancel'. The 'OK' button is circled in red, and the number '6.5' is written below it.

Title	Print Private	Date	User
AFFECTED EQUIPMENT	N N	FRI MAR 22, 2013 7:51AM	MACK_DARNELL_
ACCESSIBILITY INSPECTION NOTES	N Y	TUE OCT 1, 2013 2:17PM	SOSKINS_PATRIC
MARS COMPONENT ID	N N	MON FEB 10, 2014 2:21PM	MACK_DARNELL_
RETIRED EQUIPMENT HISTORY	N Y	FRI JUN 6, 2014 11:30AM	WALKER_MICHAEL
SERVICE HISTORY	N Y	FRI JUN 6, 2014 11:30AM	WALKER_MICHAEL
RETIREMENT JUSTIFICATION	N N	MON JUN 9, 2014 1:10PM	MACK_DARNELL_
RPDEP-TASK	N N	MON JUN 9, 2014 1:10PM	MACK_DARNELL_

View   **OK**   Cancel

6.5

Note: Text will default to: "THIS UNIT HAS BEEN REMOVED AND NO LONGER EXISTS."



The screenshot shows a 'New Note' dialog box with the following fields and options:

- Title: RETIREMENT JUSTIFICATION
- Text: THIS UNIT HAS BEEN REMOVED AND NO LONGER EXIST.
- Print on Work Order Ticket
- Private Note
- Note Date: [Empty field]
- User: [Empty field]
- Source: [Empty field]
- Buttons: OK, Cancel

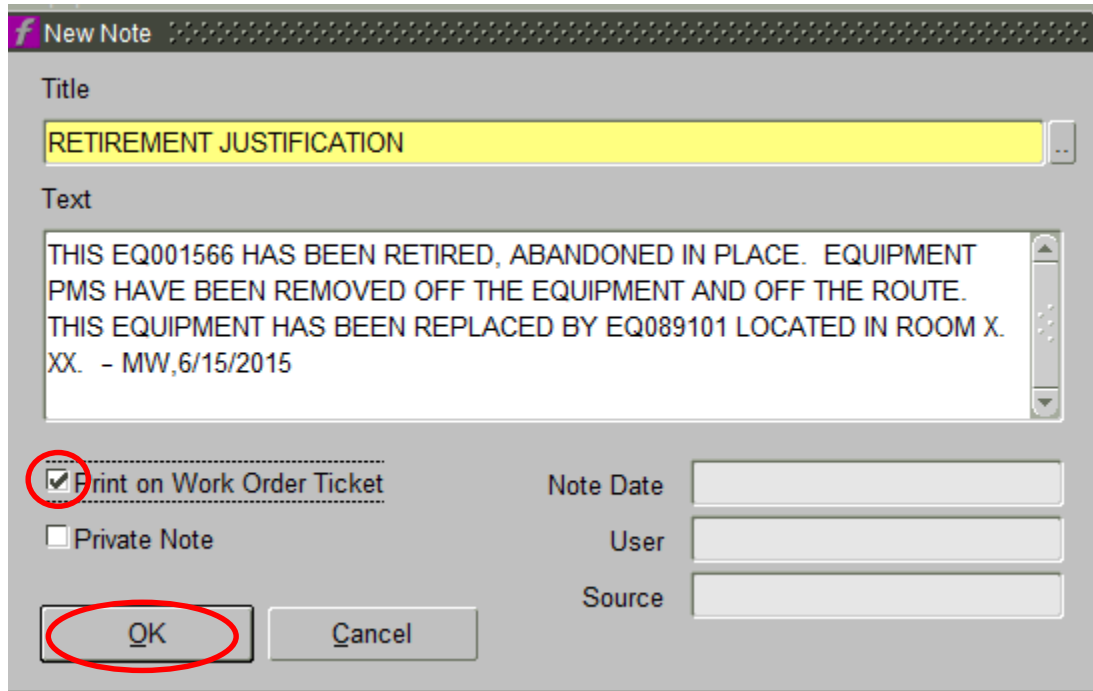
**IMPORTANT:** The Text can and should be edited if applicable with the following information:

- Why this piece of equipment being retired?
- What steps were taken to retire it?
- Was it replaced by another piece of equipment?
- When did it occur?

FOR EXAMPLE:

THIS EQ001566 HAS BEEN RETIRED, ABANDONED IN PLACE. EQUIPMENT PMS HAVE BEEN REMOVED OFF THE EQUIPMENT AND OFF THE ROUTE. THIS EQUIPMENT HAS BEEN REPLACED BY EQ089101 LOCATED IN ROOM X.XX. – DJM, 6/15/2015

- 6.6 Select the Print on Work Order Ticket check box
- 6.7 Select **OK** to go to the **Equipment Attachments** screen



**f** New Note


Title  
RETIREMENT JUSTIFICATION

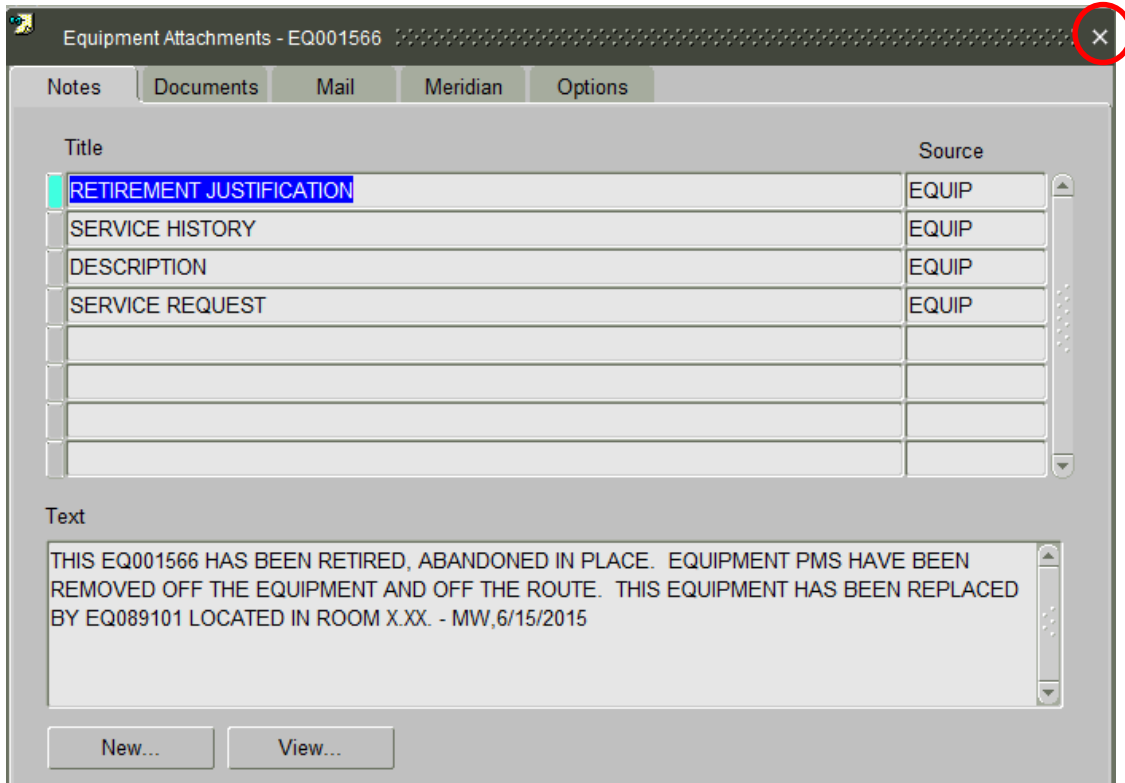
Text  
THIS EQ001566 HAS BEEN RETIRED, ABANDONED IN PLACE. EQUIPMENT PMS HAVE BEEN REMOVED OFF THE EQUIPMENT AND OFF THE ROUTE. THIS EQUIPMENT HAS BEEN REPLACED BY EQ089101 LOCATED IN ROOM X. XX. - MW,6/15/2015

Print on Work Order Ticket  
 Private Note

Note Date  
User  
Source

**OK** Cancel

6.8 Close the **Equipment Attachment** screen by selecting the  in the upper right-hand corner



**IMPORTANT:** Be sure to add an equipment note that this equipment is replacing EQXXXXXX. This creates a cross reference between the 2 pieces of equipment demonstrating history for the system.

## 7. Document Control

Title	Revision Date	Document Owner(s)	Summary of Changes	Status
FMM Retire Equipment	11/17/2012	Trecs	Original Document	Retired
Retire Equipment	07/15/2015	Business Applications, FOM (Eng & Tech)	Rewritten and updated	Published 07/20/2015

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