SHAFTLESS

SCREW CONVEYOR

INSTALLATION, OPERATION & MAINTENANCE MANUAL

SHAFTLESS GEN- 9/10/26

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FRONT MATTER

Important Safety & Advisory Information

Read this manual and all supplied component/manufacturer instructions before installing, operating, or maintaining the conveyor.

DANGER - LOCKOUT/TAGOUT

Disconnect and lock out/tag out all power and eliminate stored energy before opening the conveyor, removing covers or guards, clearing a jam, or performing inspection, maintenance, or repair.

CEMA Advisory Disclaimer

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Reference: CEMA Standard No. 353-2014, shaftless screw conveyor guidance reproduced in OCS Shaftless - Generic.

FRONT MATTER

Introduction

This manual provides a common basis for the safe installation, operation, inspection and maintenance of Orthman Conveying Systems shaftless screw conveyors. It incorporates the CEMA 353-2014 guidance and shaftless installation and service information included in the OCS Shaftless - Generic manual.

Reliability and service life depend on correct receiving, handling, alignment, assembly, drive lubrication, startup and routine inspection. Equipment drawings, drive supplier manuals, and project-specific instructions remain part of the required installation and maintenance information.

BEFORE WORK BEGINS

Review the safety section before startup. Inspect the shipment, verify the installation layout, confirm the conveyor is properly supported and aligned, and verify that all guards, covers and warning labels are in place.

Scope

- Receiving, unloading, lifting and moving conveyor sections and components.
- Trough, liner, shaftless spiral, drive, hold-down, cover and seal installation.
- Initial startup, normal operating practices and motor-load checks.
- Preventive maintenance, shutdown, storage and troubleshooting.
- General bolt tightening guidance for shaftless screw conveyor assembly fasteners.

SECTION A

Safety

Screw conveyor safety begins with a plan that considers possible dangers and hazards. Operation and maintenance personnel must be trained in safe operating procedures, recognition of hazards, and maintenance of a safe area around shaftless screw conveyors.

- Operate the conveyor only when all conveyor covers, guards and drive guards are installed and secured.
- If the conveyor is opened for inspection, cleaning, maintenance or observation, lock out/tag out the power so the conveyor cannot be restarted until covers and guards are replaced.
- Where an open housing is required by the application, guard the exposed conveyor with a railing or fence in accordance with applicable requirements.
- Protect manual or mechanical feed openings with grating where practical. If grating cannot be used, guard the exposed section with a railing or fence and post warning signs.
- Do not place hands, feet or any part of the body in the conveyor.
- Never walk or stand on conveyor covers, grating or guards.
- Do not use the conveyor for a purpose other than its intended service.
- Do not poke or prod material through openings with a bar, stick or similar object.
- Keep the area around the conveyor drive and control station free of debris and obstacles.
- Eliminate stored energy before opening the conveyor, and never clear a jam until power is locked out/tagged out.
- Do not attempt field modification of the conveyor or components without appropriate engineering review.
- If hazardous materials or internal/external pressure are involved, consult the equipment manufacturer before modifications.
- Warning labels must remain visible and legible. Replace damaged or illegible labels.

SAFETY DEVICES DO NOT REPLACE LOCKOUT/TAGOUT

Interlocks and other secondary safety devices can supplement a safe system, but they do not replace disconnecting and locking out the power before removing guards or covers.

SECTION A

CEMA Safety Labels

Place safety labels on inlets, discharges, troughs, covers, inspection doors and drive guards. See the placement guidelines on the following page.

WARNING  Exposed moving parts can cause severe injury. **LOCK OUT POWER before removing guard.** CHR930001	**WARNING**  Walking or standing on conveyor covers or gratings can cause severe injury. **STAY OFF.** CHS991026	**WARNING**  Exposed conveyors and moving parts can cause severe injury. **LOCK OUT POWER before removing cover or servicing.** CVS930010
WARNING  Exposed buckets and moving parts can cause severe injury. **LOCK OUT POWER before removing cover or servicing.** CVS930012	**WARNING**  Exposed screw and moving parts can cause severe injury. **LOCK OUT POWER before removing cover or servicing.** CHR930011	**WARNING**  Exposed screw and moving parts can cause severe injury. **LOCK OUT POWER before removing cover or servicing.** CVS930011

Prominently display these safety labels on installed equipment. Labels do not replace an in-plant safety training program. Contact CEMA or the equipment manufacturer for replacement labels.

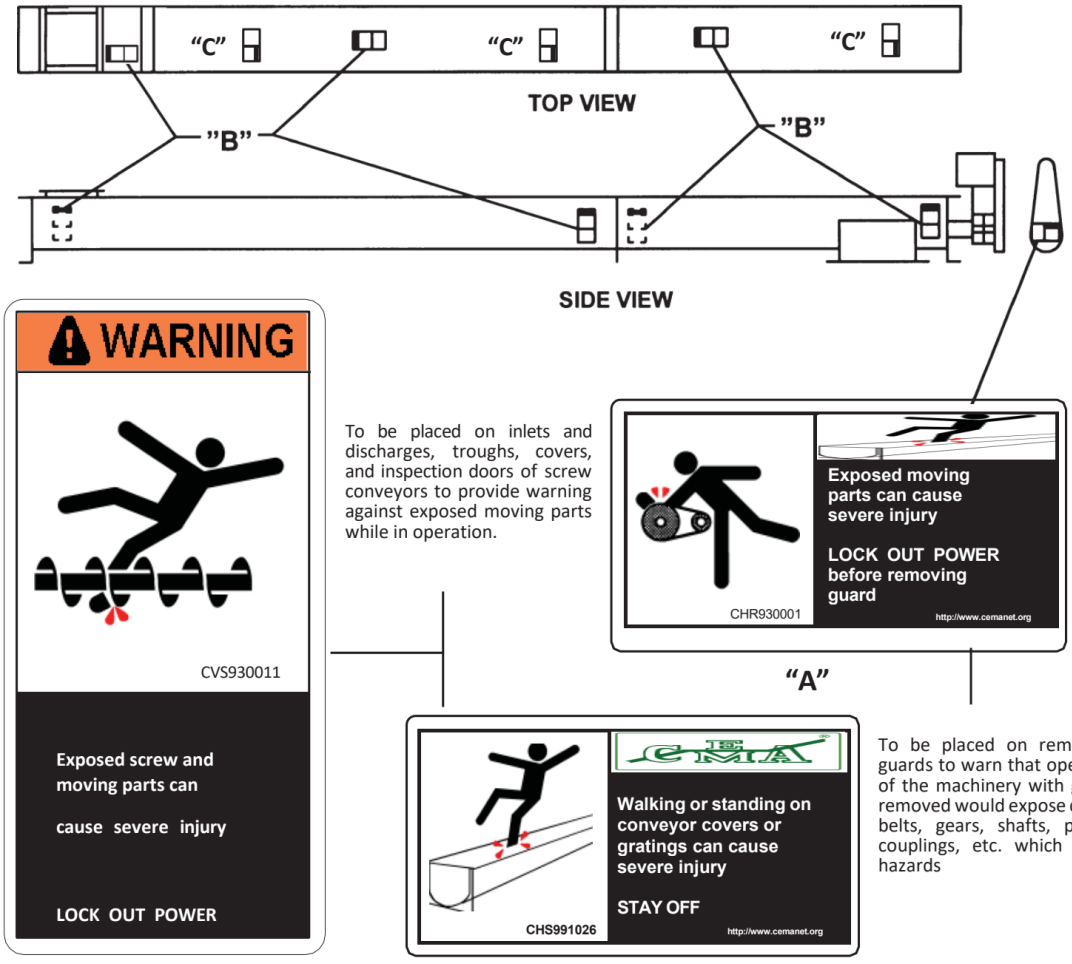
SECTION A

Shaftless Screw Conveyor Safety Label Placement

CEMA Safety Labels ***Placement Guidelines***

Product: Bulk Handling Equipment

Equipment: Screw Conveyor



Label A: On belt guards. Label B: On ends of trough, middle of covers and at inlet openings. Label C: On top of covers. Solid marks indicate the near side; dashed marks indicate the far side.

SECTION A

Warning and Safety Reminders

WARNING AND SAFETY REMINDERS FOR SCREW, DRAG, AND BUCKET ELEVATOR CONVEYORS

It is the responsibility of the contractor, installer, owner and user to install, maintain and operate the conveyor, components and, conveyor assemblies in such a manner as to comply with the Occupational Safety and Health Act and with all state and local laws and ordinances and the American National Standards Institute (ANSI) B20.1 Safety Code.

In order to avoid an unsafe or hazardous condition, the assemblies or parts must be installed and operated in accordance with the following minimum provisions.

1. Conveyors shall not be operated unless all covers and/or guards for the conveyor and drive unit are in place. If the conveyor is to be opened for inspection cleaning, maintenance or observation, the electric power to the motor driving the conveyor must be LOCKED OUT in such a manner that the conveyor cannot be restarted by anyone; however remote from the area, until conveyor cover or guards and drive guards have been properly replaced.

2. If the conveyor must have an open housing as a condition of its use and application, the entire conveyor is then to be guarded by a railing or fence in accordance with ANSI standard B20.1.(Request current edition and addenda)

3. Feed openings for shovel, front loaders or other manual or mechanical equipment shall be constructed in such a way that the conveyor opening is covered by grating. If the nature of the material is such that a grating cannot be used, then the exposed section of the conveyor is to be guarded by a railing or fence and there shall be a warning sign posted.

4. Do not attempt any maintenance or repairs of the conveyor until the power has been LOCKED OUT.

5. Always operate the conveyor in accordance with these instructions and those contained on the caution labels affixed to the equipment.

6. Do not place hands, feet, or any part of your body in the conveyor.

7. Never walk on conveyor covers, grating or guards.

8. Do not use conveyor for any purpose other than that for which it was intended.

9. Do not poke or prod material into the conveyor with a bar or stick inserted through the openings.

10. Keep area around conveyor drive and control station free of debris and obstacles.

11. Eliminate all sources of stored energy (materials or devices that could cause conveyor components to move without power applied) before opening the conveyor

12. Do not attempt to clear a jammed conveyor until power has been LOCKED OUT.

13. Do not attempt field modification of conveyor or components.

14. Conveyors are not normally manufactured or designed to handle materials that are hazardous to personnel. These hazardous materials include explosives, flammable, toxic or otherwise dangerous to personnel. Conveyors may be designed to handle these materials. Conveyors are not manufactured or designed to comply with local, state or federal codes for unfired pressure vessels. If hazardous materials are to be conveyed or the conveyor is subjected to internal or external pressure, the manufacturer should be consulted before any modifications.

CEMA insists that disconnecting and locking out the power to the motor driving the unit provides the only real protection against injury. Secondary safety devices are available; however, the decision as to their need and the type required must be made by the owner- assembler as we have no information regarding plant wiring, plant environment, the interlocking of the screw conveyor with Other equipment, extent of plant automation, etc. Other devices should not be used as a substitute for locking out the power prior to removing guards or covers. We caution that use of the secondary devices may cause employees to develop a false sense of security and fail to lock out power before removing covers or guards. This could result in a serious injury should the secondary device fail or malfunction.

There are many kinds of electrical devices for interlocking of conveyors and conveyor systems such that if one conveyor in a system or process is stopped other equipment feeding it or following it can also be automatically stopped.

Electrical controls, machinery guards, railings, walkways, arrangement of installation, training of personnel, etc., are necessary ingredients for a safe working place. It is the contractor, installer, owner and user's responsibility to supplement the materials and services furnished with these necessary items to make the conveyor installation comply with the law and accepted standards.

Conveyor inlet and discharge openings are designed to connect to other equipment or machinery so that the flow of material into and out of the conveyor is completely enclosed.

One or more warning labels should be visible on conveyor housings, conveyor covers and elevator housings. If the labels attached to the equipment become illegible, please order replacement warning labels from the OEM or CEMA.

The Conveyor Equipment Manufacturers Association (CEMA) has produced an audio- visual presentation entitled “Safe Operation of Screw Conveyors, Drag Conveyors, and Bucket Elevators.” CEMA encourages acquisition and use of this source of safety information to supplement your safety program.

SECTION A

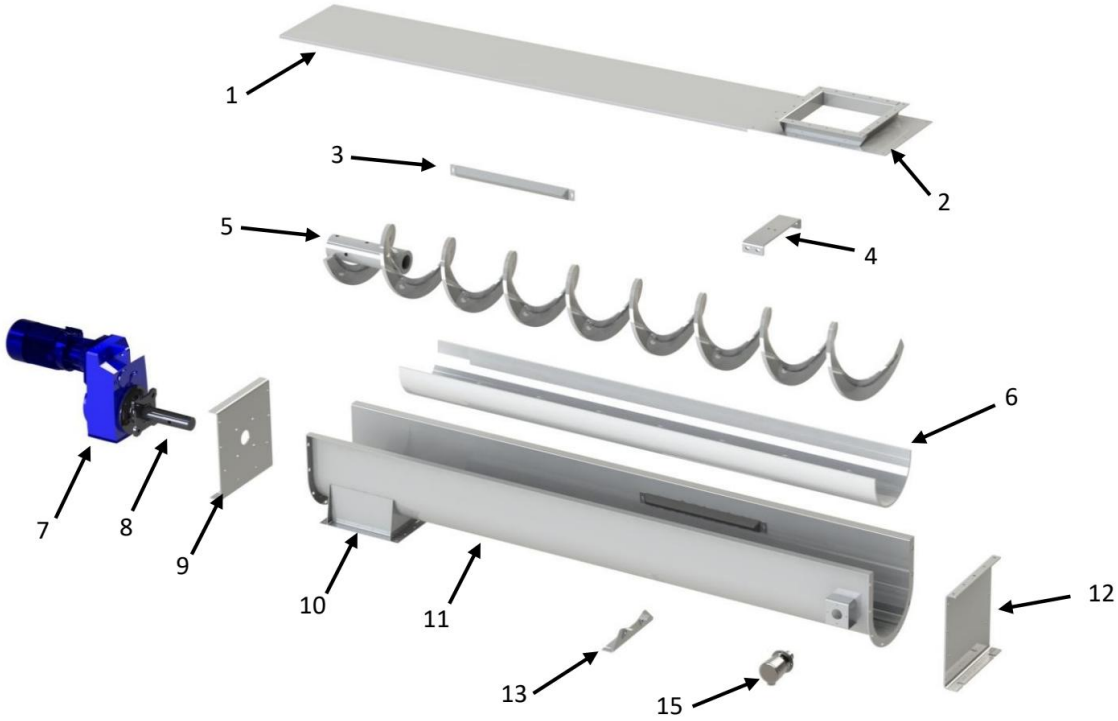
Screw Conveyor Safety Poster



SECTION B

Shaftless Screw Conveyor Components

The following exploded view and bill of materials identify the components of the typical shaftless conveyor shown in the Generic manual. Actual equipment may vary by application, drive arrangement and optional items.



Shaftless Component Identification	
Item	**Description**
1	Cover
2	Inlet
3	Hold-down
4	Batten
5	Shaftless screw
6	Liner
7	Drive
8	Drive shaft
9	Shaftless drive endplate
10	Discharge
11	Trough
12	Blank endplate
13	Saddle/foot (optional)
14	Drive end seal (optional; not shown)
15	Zero speed sensor (optional)

SECTION C

Receiving & Lifting

Receiving and Inspection

1. Check all items against shipping papers immediately upon receipt for shortages and damage.
2. Inspect troughs, shaftless spirals, trough liners, covers, drive units and other shipped components.
3. Do not attempt to install damaged components or assemblies.
4. Long factory-assembled conveyors may be separated into practical shipping lengths and match marked for reassembly.

Lifting and Moving

1. Use extreme care to prevent damage when moving assembled conveyors or individual components.
2. Use spreader bars with slings as the recommended support method for lifting.
3. Keep unsupported span to 12 feet or less unless project-specific lifting instructions state otherwise.
4. Never lift a conveyor with only one support point.
5. Account for heavy components such as drives or gates when selecting lifting points because they affect load balance and bending.
6. When withdrawing a conveyor lengthwise from a truck, support the trailing end at the same elevation as the leading end. Add support as the overhang approaches approximately 10 feet.

LIFTING CAUTION

Never lift only one end of a conveyor assembly or screw when the length exceeds 12 feet. Select lifting points to control bending and maintain balance.

SECTION D

Installation

Install the conveyor straight, true and adequately supported before installing the liners and aligning the shaftless spiral assembly.

Trough Erection and Alignment

1. Verify that the mounting surface is level and true.
2. Place trough sections in the proper sequence with the discharge spout and inlet locations correctly oriented.
3. Connect trough joints loosely. Do not tighten the flange bolts yet.
4. Assemble the trough ends to the correct conveyor ends.
5. Attach a piano wire the full length of the conveyor at the centerline and pull it tight.
6. Tighten trough flange bolts while keeping the trough assembly true to the piano wire. Check both horizontal and vertical alignment. Maximum deviation at any point along the conveyor is 1/8 inch.
7. Anchor the trough assembly to the mounting surface. CEMA recommends supporting trough assemblies every 10 to 12 feet; saddles or feet may be required.

Liners and Drive Location

Install liner sections using the original equipment manufacturer's recommended procedure.

The drive unit is normally located at the discharge end of the conveyor. Follow the equipment drawings for the supplied drive arrangement.

Center the drive in the seal and trough-end openings. Tighten mounting bolts to the proper torque rating in the Bolt Torque Guide.

SECTION D

Shaftless Spiral & Drive Assembly

1. Assemble the drive trough end to the correct conveyor end. Tighten the bolts to the proper torque rating.
2. Assemble the seal to the drive trough end. Do not tighten the seal bolts yet.
3. Insert the drive shaft from inside the trough through the seal and outer trough end, then into the reducer bore.
4. Place the shaftless spiral section in the lined trough, starting at the drive end.
5. Mate the shaftless spiral to the drive shaft and install the bolts. Do not tighten the bolts yet.
6. Rotate the complete shaftless spiral assembly to check alignment. Adjust as required.
7. Tighten all drive-shaft bolts to the proper torque rating. See the Bolt Torque Guide and its coupling-bolt note where applicable.
8. Adjust the seal as required and remove all debris from the conveyor.
9. Install the hold-downs.
10. Install covers in the proper sequence, starting at the inlet end, and attach with the provided fasteners.
11. Lubricate the drive in accordance with the manufacturer's instructions. Verify the reducer oil level before startup.
12. Verify all CEMA safety labels are in the proper locations.

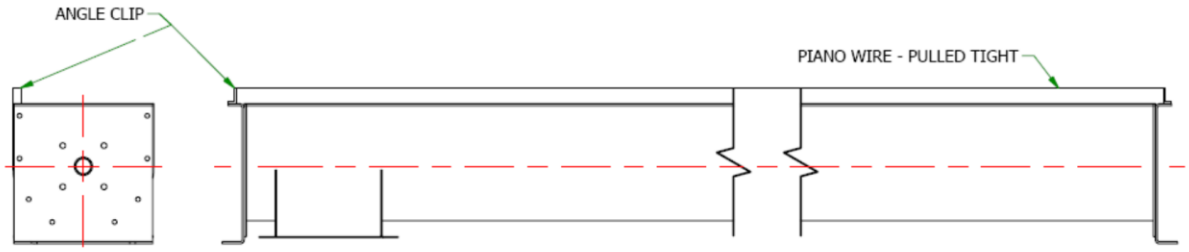
FINAL ROTATION CHECK

The complete screw assembly should rotate freely by hand before covers are installed and before power is applied.

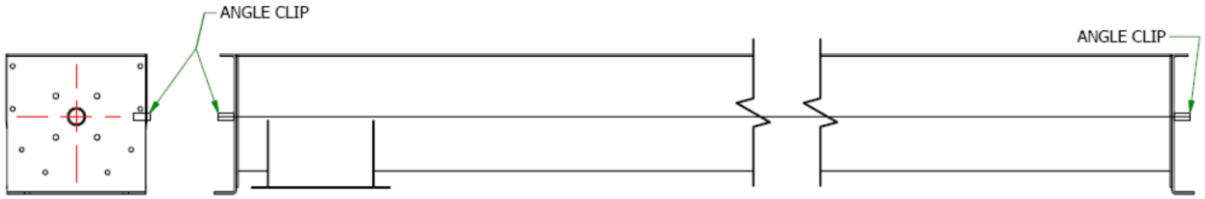
SECTION D

Piano Wire Alignment

Use a tight piano wire to verify trough alignment during erection. Alignment must be checked in both horizontal and vertical directions before the conveyor is anchored and before the screw assembly is finalized.



CEMA COMMONLY USED PIANO WIRE SETUP
PIANO WIRE ATTACHED TO TOP OF CONVEYOR ON SIDE



OPTIONAL PIANO WIRE SETUP
PIANO WIRE ATTACHED TO CENTERLINE OF CONVEYOR ON SIDE

CEMA commonly used and optional piano-wire setup diagrams.

SECTION D

Covers, Seals & Final Installation Checks

Trough Covers

1. Place cover sections on the assembled trough in the proper sequence, beginning at the inlet end.
2. Where gaskets are supplied, place the gasket between the cover and the trough flange.
3. Secure the covers with the provided fasteners. Do not over-tighten fasteners when gaskets are used; excessive tightening can buckle covers and contribute to leakage.
4. If field drilling is required, clamp the cover to the trough and alternate drilling from one side of the conveyor to the other while securing the cover progressively.

Seals and Drive Lubrication

- Center the drive shaft in the seal and trough-end openings before tightening seal hardware.
- Adjust seals as required. Follow the specific seal instructions supplied with the conveyor when available.
- Lubricate the drive in accordance with the component manufacturer's instructions.

Final Installation Checks

- Remove tools, debris and foreign material from the conveyor.
- Verify all assembly and mounting bolts are tightened to the proper torque.
- Verify all required CEMA safety labels are in the proper locations and are legible.
- Verify all covers, guards and safety devices are installed before power is applied.

WARNING: GEAR REDUCER LUBRICATION

Before startup, verify gearbox lubricant type, fill level and mounting-position requirements using the supplied gearbox manufacturer documentation.

Depending on gear reducer manufacture, gear reducers do not ship from Orthman Conveying Systems filled with oil.

Gear reducers must be positioned, verified and filled to the proper level by the installer or user before startup.

SECTION E

Initial Startup

Before Initial Startup

1. Lock out/tag out all power.
2. Verify gear reducer lubrication in accordance with the reducer manufacturer instructions.
3. Confirm all tools and foreign materials have been removed from the conveyor.
4. Turn the drive unit by hand to check alignment and obstructions.
5. Confirm covers, guards and safety devices are installed and operating properly.
6. Attach gates to inlet and discharge chutes where applicable.

Initial Startup - Without Material

1. Reenergize power and momentarily start the conveyor to confirm correct screw rotation. If rotation is incorrect, shut down promptly and have a qualified electrician correct the wiring.
2. Operate the conveyor without material for several hours as a break-in period while observing for unusual noise, vibration or drive misalignment. If these conditions occur, use the troubleshooting section.
3. Stop the conveyor and lock out/tag out all power.
4. Remove covers and recheck bolt tightness. Tighten bolts to the proper torque rating and reinstall covers.
5. Check all assembly and mounting bolts, and verify the discharge is clear.

Initial Startup - With Material

1. Start the conveyor and operate without material for several minutes.
2. Feed material gradually until design capacity is reached.
3. Do not exceed the conveyor design speed, capacity or material density.
4. Operate for several hours with material. Check motor amperage at design capacity against motor full-load amperage. Verify supply voltage is within normal operating limits.
5. Start and stop the conveyor several times during commissioning, subject to the loaded-starting limitations in Section F.
6. Stop and lock out/tag out the conveyor. Recheck drive connection bolts, assembly bolts and mounting bolts, then reinstall covers. Verify reducer oil level.

SECTION F

Normal Operation

NORMAL OPERATING RULE

Unless the conveyor was specifically designed for loaded starting, start the conveyor empty and allow it to clear before shutdown. Repeated or routine starting under load can damage equipment and reduce service life.

Operating Practices

- Operate only with all approved covers, guards and safety labels in place.
- Operate within the design material loading, speed, capacity and density. Excessive trough loading can accelerate spiral and liner wear and increase loads on drive components.
- Monitor for unusual noise, vibration, leakage or visible movement of components.
- Check motor amperage when conveying at design capacity. Excessive amperage can indicate overload, low voltage or another mechanical/electrical problem.
- Keep the discharge clear so material can leave the conveyor without restriction.
- Keep the drive and control area clean and accessible.
- Do not open covers, clear jams, inspect internal components or make adjustments until power and stored energy are locked out/tagged out.

If Abnormal Operation Is Observed

Stop the conveyor as conditions require, lock out/tag out all power, inspect the equipment, and use the troubleshooting section of this manual to identify likely causes. Do not continue operating a conveyor with binding, excessive heat, repeated overload, abnormal noise, damaged guarding or visible component failure.

SECTION G

Preventive Maintenance

Practice good housekeeping and establish routine periodic inspection of the complete conveyor. Lock out/tag out all power before inspection or maintenance.

Inspection Items

Component	Inspection / Maintenance
Gear Reducers	Check lubricant condition and level. Maintain in accordance with the supplied reducer manual.
Drives	Check for leakage and fluid level. Refer to the manufacturer's specifications.
Shaftless Spiral	Check for damage, excessive wear and material buildup. Replace spiral sections as necessary.
Troughs	Check for damage, excessive wear and material buildup. Verify alignment using the piano-wire method. Replace sections as necessary.
Trough Liners	Check for damage, excessive wear and material buildup. Replace liner sections if wear exceeds 1/4 inch.
Drive Shaft	Check tightness of the thrust washer and bolt. Check for runout. Tighten bolts to the proper torque rating.
Seals	Check for leakage. Adjust the seal or replace packing as required.
Assembly Bolts	Check tightness. Tighten all assembly bolts to the proper torque rating.
Guards	Check clearance and bolt tightness.

SECTION G

Recommended Maintenance Schedule

Before inspection, disconnect and lock out/tag out power to the motor. Remove covers only after the conveyor is in a zero-energy state, then inspect for loose mounting bolts, damage and wear.

Item	Interval	Requirement
Seals	Every 100 hours	Inspect for leakage, damage and condition.
Drive	Every 1,500 hours	Inspect the drive. Maintain the gearbox in accordance with the enclosed supplier manual.
Trough Liners	Every 2,000 hours	Inspect for excessive wear. Replace if wear exceeds 1/4 inch.

Replacing the Shaftless Spiral

1. Lock out/tag out all power.
2. Proceed from the end opposite the drive unit. Remove all covers and hold-downs.
3. Disconnect the drive shaft and remove the damaged shaftless spiral section.
4. Insert the replacement shaftless spiral section and reassemble the conveyor in accordance with Section D.

Replacing the Trough Liner

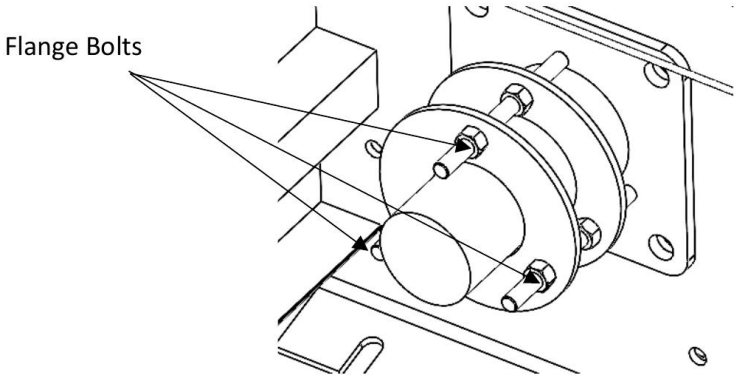
1. Lock out/tag out all power.
2. Proceed from the end opposite the drive unit. Remove all covers and hold-downs.
3. Disconnect the drive shaft and remove the shaftless spiral and damaged liner.
4. Insert the replacement liner and reassemble the conveyor in accordance with Section D.

SECTION H

Seal Packing Replacement

Applies only when a flange gland or packing gland seal is equipped.

1. Disconnect and lock out/tag out power to the motor and remove the conveyor from service.
2. Remove the three bolts retaining the packing gland seal flange.
3. Discard the old packing and install new packing. Contact Orthman Conveying Systems for replacement material recommendations when required.
4. Reinstall the packing gland flange and bolts.
5. Retighten the gland only enough to press the packing against the shaft. Do not over-tighten; excessive compression can damage the shaft or gland.



Typical packing gland flange and retaining bolts.

SECTION I

Shutdown & Storage

Emergency Shutdown

1. Shut down and lock out/tag out all power.
2. Remove covers only after a zero-energy state has been established.
3. Remove obstructions and product from the conveyor.
4. Inspect components for damage or wear and replace damaged or worn components.
5. Turn the drive unit by hand to check alignment and obstructions.
6. Replace all covers and guards.
7. Restart in accordance with the startup section of this manual.

Extended Shutdown / Storage

1. Operate the conveyor until product has been removed, then lock out/tag out all power.
2. Clean the conveyor and inspect all components for damage or wear.
3. Lubricate the drive in accordance with the manufacturer's instructions.
4. Coat exposed metal surfaces with rust preventative as required.
5. Protect the conveyor from weather, moisture and extreme temperatures. Do not use coverings that promote condensation.
6. When service is resumed, restart the conveyor in accordance with the startup section.

SECTION J

Troubleshooting

Use the following guide after the conveyor has been shut down and locked out/tagged out. The shaftless troubleshooting guidance below is adapted from the Generic manual. Where it refers to CEMA 350, consult that engineering guidance or contact Orthman Conveying Systems for assistance.

Problem	Possible Cause	Corrective Action
1. Accelerated shaftless spiral wear	Spiral material too soft.	Use a harder spiral material.
1. Accelerated shaftless spiral wear	RPM too high or trough loading too high.	Reduce speed.
2. Premature trough or liner failure	Liner too thin.	Increase liner thickness. Use a liner with better wear resistance.
2. Premature trough or liner failure	Incorrect alignment.	Straighten or replace the shaftless spiral.
3. Drive shaft breakage	Excessive torque or improper alignment.	Consult CEMA 350 for proper torque rating.
4. Motor overload	Motor undersized.	Consult CEMA 350 for proper horsepower requirements.
4. Motor overload	Upset loading condition.	Empty and clean out the conveyor. Control feed and operate within design specifications.

SECTION K

Bolt Torque Guide

The following general tightening torque values are for fasteners used to assemble shaftless screw conveyors. All bolted applications should be evaluated to determine the optimum tightening torque. The K factor in the formula below is an estimate; the commonly used K factor shown in the source guide is 0.20 for plain-finished bolts.

$$T = K \times D \times P$$

T = target tightening torque (in-lb) | K = friction coefficient/nut factor | D = nominal bolt diameter (in.) | P = desired tensile load (lb)

Bolt Dia.	Threads/In. UNC	Recommend Torque Spec (ft-lbs)			
		SAE 2	SAE 5	SAE 8	18-8 & 316 Stainless
1/4	20	5	9	12	6
5/16	18	11	18	25	11
3/8	16	18	31	44	20
7/16	14	28	49	69	29
1/2	13	44	73	105	40
9/16	12	63	108	149	52
5/8	11	96	147	212	86
3/4	10	158	252	351	115
7/8	9	219	389	552	180
1	8	316	589	784	240

COUPLING BOLT TORQUE

The Bolt Torque Guide does not directly list coupling-bolt torque. CEMA recommends tightening coupling bolts to 75 percent of the values in this guide to reduce the risk of tension failure caused by over-tightening.

COMPANY INFORMATION

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PARTS, SERVICE & TECHNICAL SUPPORT

When requesting support, provide the conveyor/job identification, component description, observed condition and any relevant motor/drive information so Orthman Conveying Systems can assist efficiently.