Asset Manager

MANAGING ASSETS: VEHICLES, TOOLS, AND TEST EQUIPMENT

VERSION 1.1
UPDATED 03/04/22

MANAGING ASSETS: VEHICLES, TOOLS, AND TEST EQUIPMENT

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for accessing, viewing, and managing vehicles, tools, and test equipment assets in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on vehicles, tools, and test equipment asset functionality.

VERSION INFORMATION (THIS DOCUMENT)

Version **1.1** Release Date **03/04/2022**

Owner **NU Facilities**

Version Notes **This is the original version of the document; content within represents delivered system functionality at Vehicles, Tools, and Test Equipment Assets go-live (3/1/2019), and has been verified as up-to-date of this document's release (03/04/22)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	04/24/2019	Created	NU Facilities
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This document has been structured by the key topic(s) and process(es) involved in the management of vehicles, tools, and test equipment assets. Please view the table below to locate a specific topic or process contained within the document.

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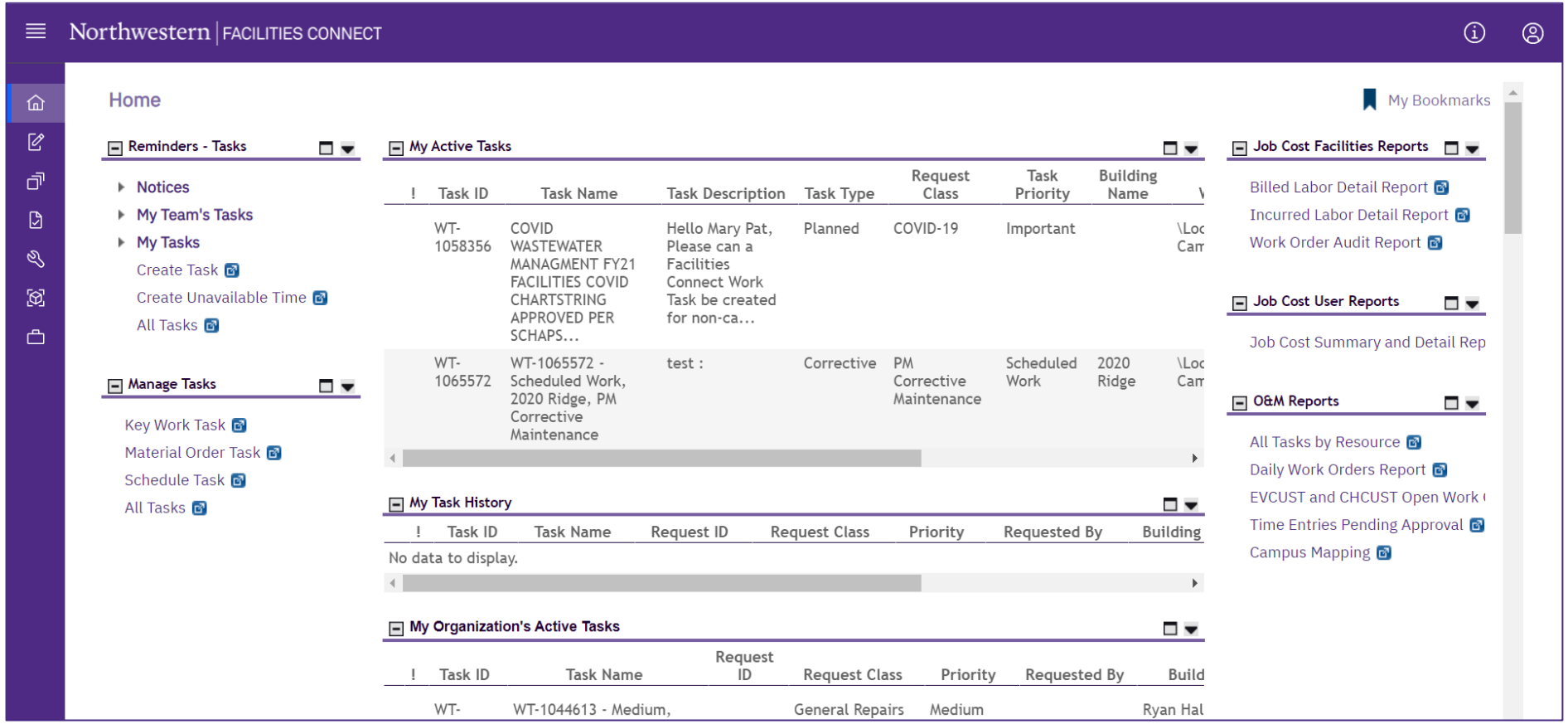
GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to review, modify, and create **Vehicles, Tools, and Test Equipment Assets** and **Specifications** as outlined in this job guide, the user **must**:
  a) Possess the **Asset Manager** role and responsibilities

PROCESS



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▼ IMPORTANT

- Before proceeding to the processes outlined within this document, it is important to understand the distinction between a **Vehicles, Tools, or Test Equipment Asset** and **Specification**
- In Facilities Connect, **Assets** and **Specifications** enjoy a complementary relationship, and possess an equal footing in terms of importance for their completion, accuracy, and thoroughness of respective records
- The graphic on the right side of this page highlights the key differences between **Assets** and **Specifications**, and how the association of a **Specification** to an individual **Asset** completes the **Asset record**.

  See Process 2.3 – Create a New Asset (p.33) to view the steps involved with the association of a **Specification** with an **Asset** record

▶ PROCESS

UNDERSTANDING SPECIFICATIONS AND ASSETS

SPECIFICATION

What is it?

- A detailed description of asset information, but not the actual asset record
- Used to define and organize important common elements between assets of the same type adding simplicity and consistency to asset management
- Is applied to a single (or multiple) asset record(s) in Facilities Connect

What information does it contain?

- Manufacturer and Model Details
- Specification and Service Class Information
- Unit dimensions, capacities, and energy consumption / efficiency details
- Associated Safety Plans
- Cost information
- List of Associated Parts
- Recommended Maintenance Details

ASSET

What is it?

- An individual owned or leased item (e.g. equipment, technology, vehicles, tools, etc.) on campus
- Can also be associated with an organization, location, and/or person
- Includes an associated specification

What information does it contain?

- Serial number, NU Asset Tag Barcode, and Campus Location Information
- Unit Condition and In/Out of Service Dates
- Associated Specification
- Preventive Maintenance Schedule
- Operating Schedule
- Operational History / Move, Downtime Information
- Item Cost Information
- Parts List

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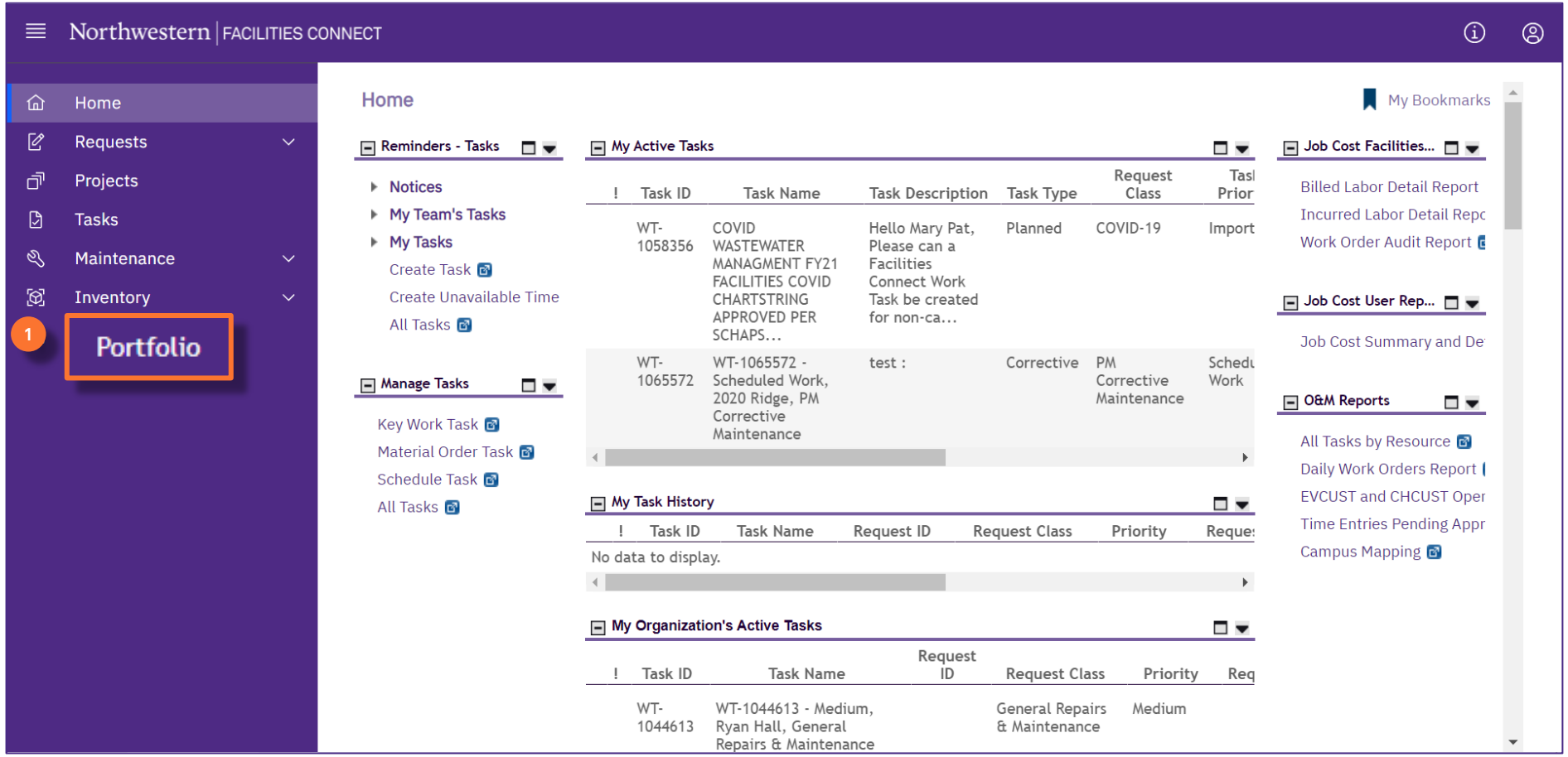
PROCESS

1) To begin working with **Assets**, click on the **Portfolio** tab at the top of the **Facilities Connect Home Screen**

*<<Upon clicking, the **Portfolio** screen will open in the main window>>*

INFORMATION



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▼ PROCESS

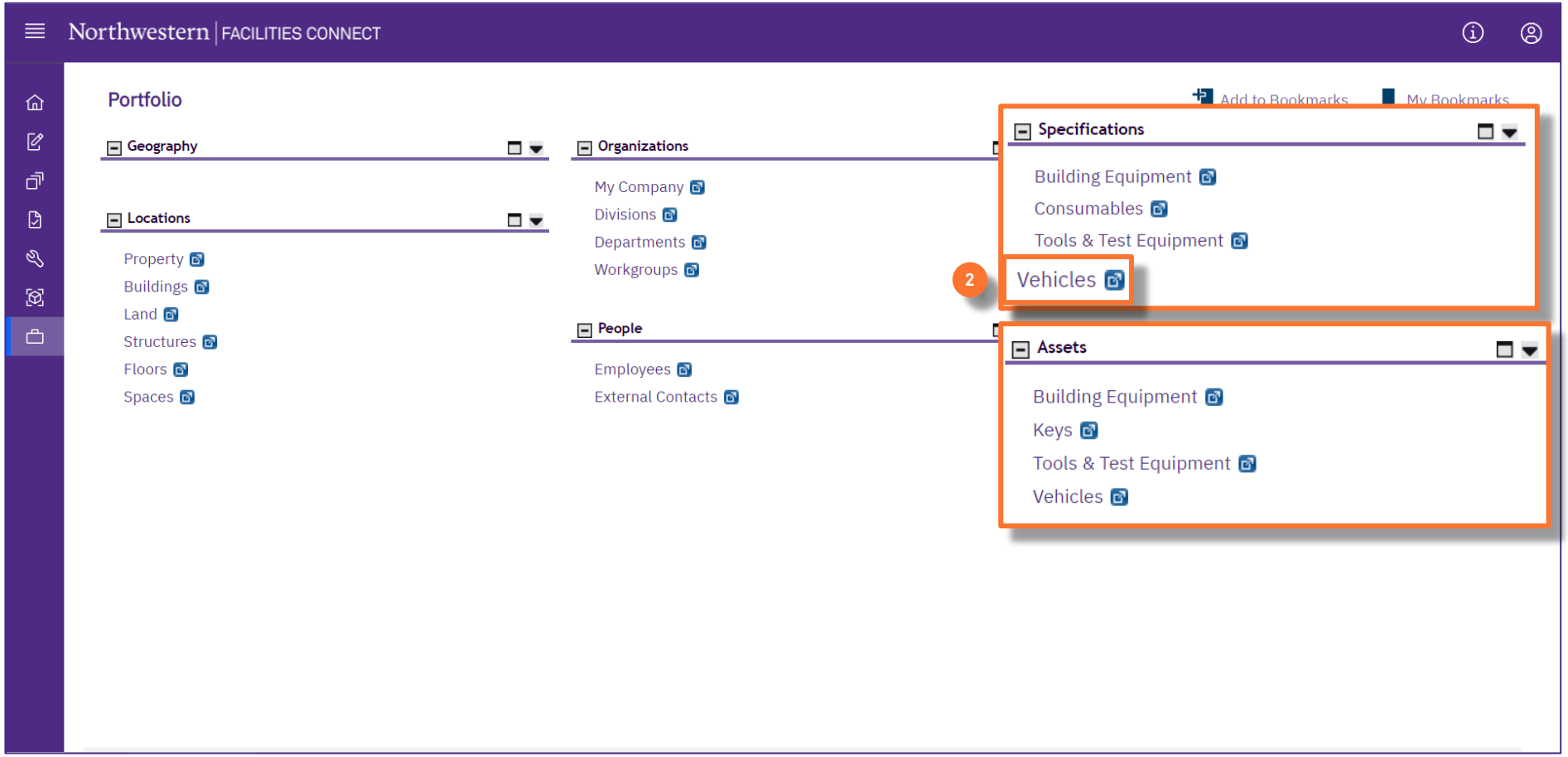
On the **Portfolio** screen, you will use both the **Specifications** and **Assets** menus for managing assets. Both menus are located on the right side of the screen.

When working with **Vehicles, Tools, or Test Equipment**, asset and specification information is accessible via the **Vehicles** or **Tools & Test Equipment** options, located on each menu.

2) To begin, access **Vehicles Specifications**, click on the option labeled **Vehicles**, located within the **Specifications** menu

*<<Upon clicking, the **Vehicles Specification** screen will open in the main window>>*

▶ INFORMATION



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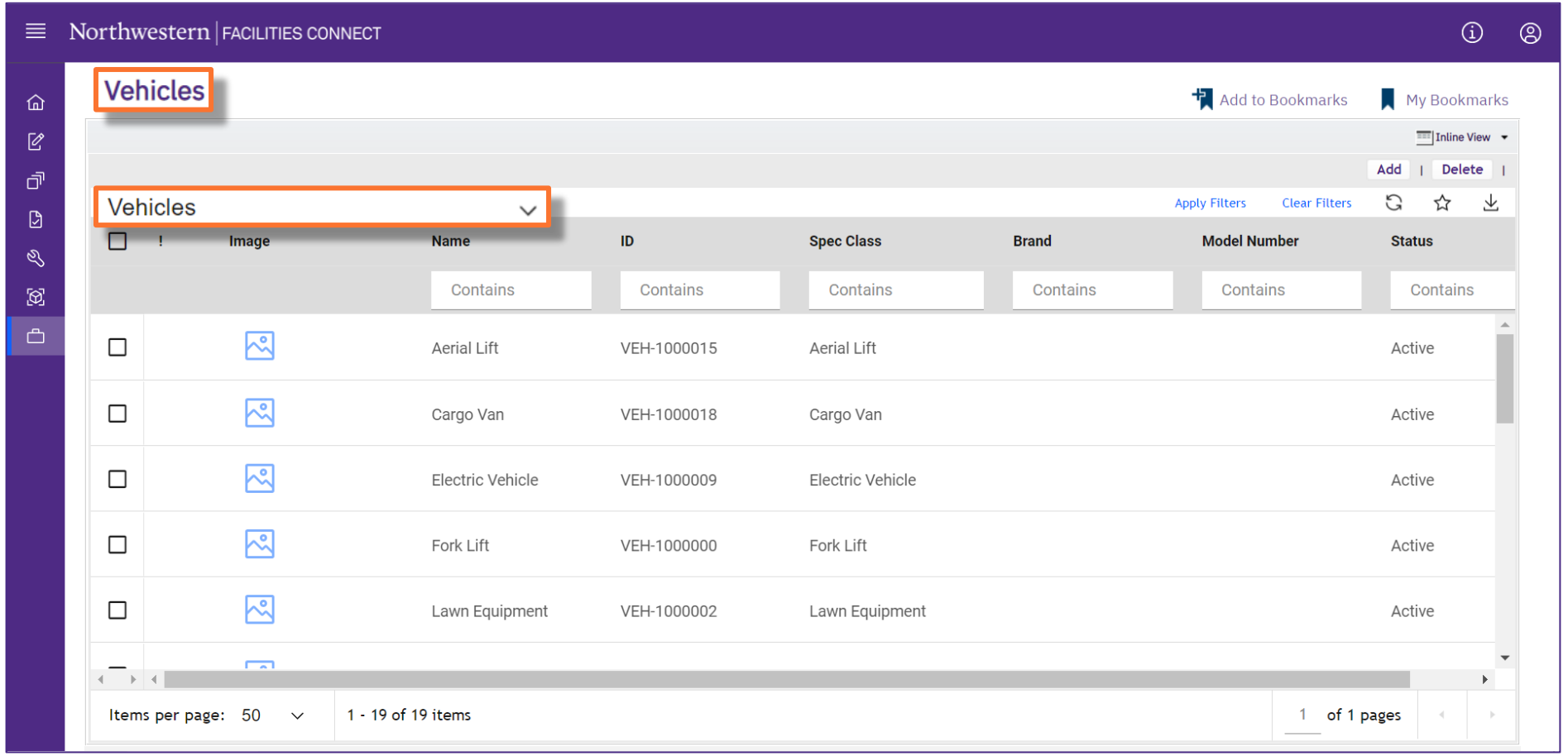
PROCESS

INFORMATION

Upon arriving on the **Vehicles Specification** screen, you will notice the following indicators of your location in Facilities Connect (as shown on the right):

- Page Title
  Vehicles
- Related Report Selection
  Vehicles

The presence of these two (2) indicators confirm that you are on the correct screen for working with **Vehicles Specifications**.



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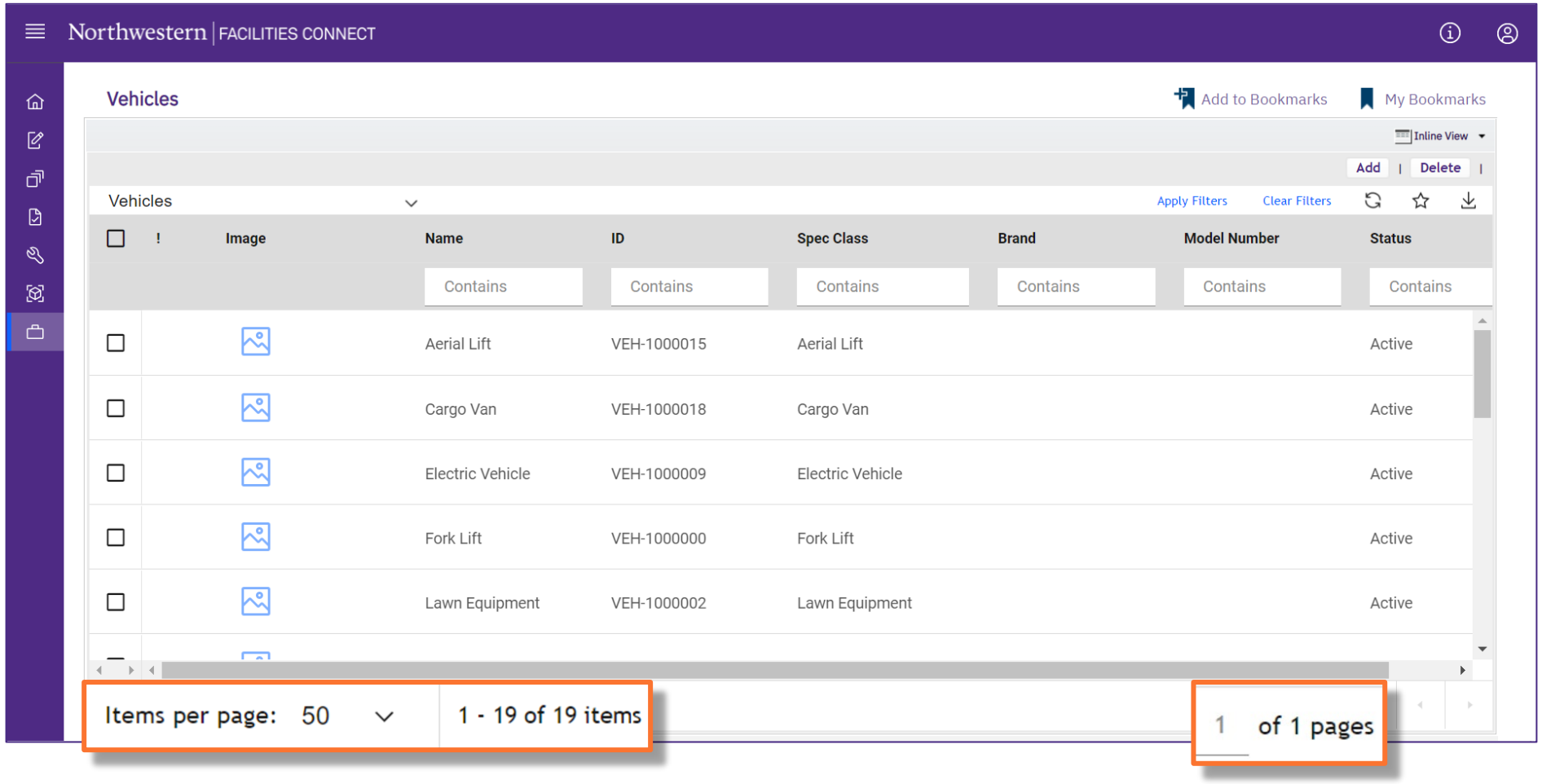
PROCESS

INFORMATION

On the **Vehicles Specification** screen, you are able to locate and access an existing vehicles specification, or create a new vehicles specification in Facilities Connect.

Note: On this tab, always be aware of the number of items present within each section (shown on the **Information Bar**)

As a default, Facilities Connect will display the first ten (10) items in each section. This can be adjusted by changing the number of visible records via the **Show** dropdown on the right side of each section



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▼ PROCESS

Process 1.1

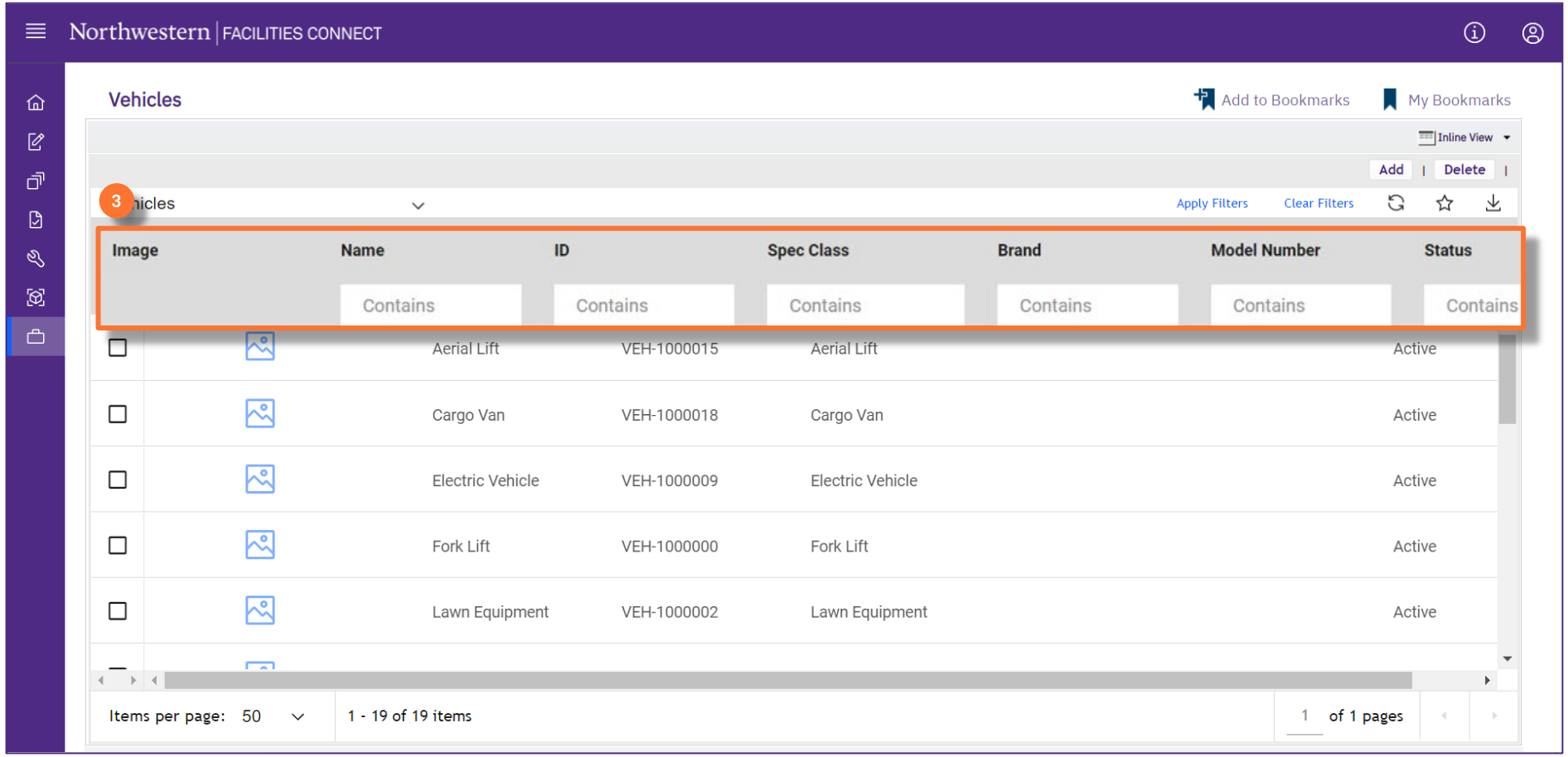
Locate an Existing Specification

Following Step #2, on the **Vehicles Specification** screen:

3) Use available **Sort / Filter** functionality to locate a desired specification

- To **Sort**, click on any column header (e.g. Name, Spec ID, Spec Class, Brand, etc.) to toggle an ascending / descending sort order for the contents of the column.
- To **Filter**, type your desired criteria (e.g. "skid steer") into one (or multiple) white filter box(es) beneath the column header row. Once all the criteria has been added, press the **Enter** key to filter results below.

▶ INFORMATION



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▼ PROCESS

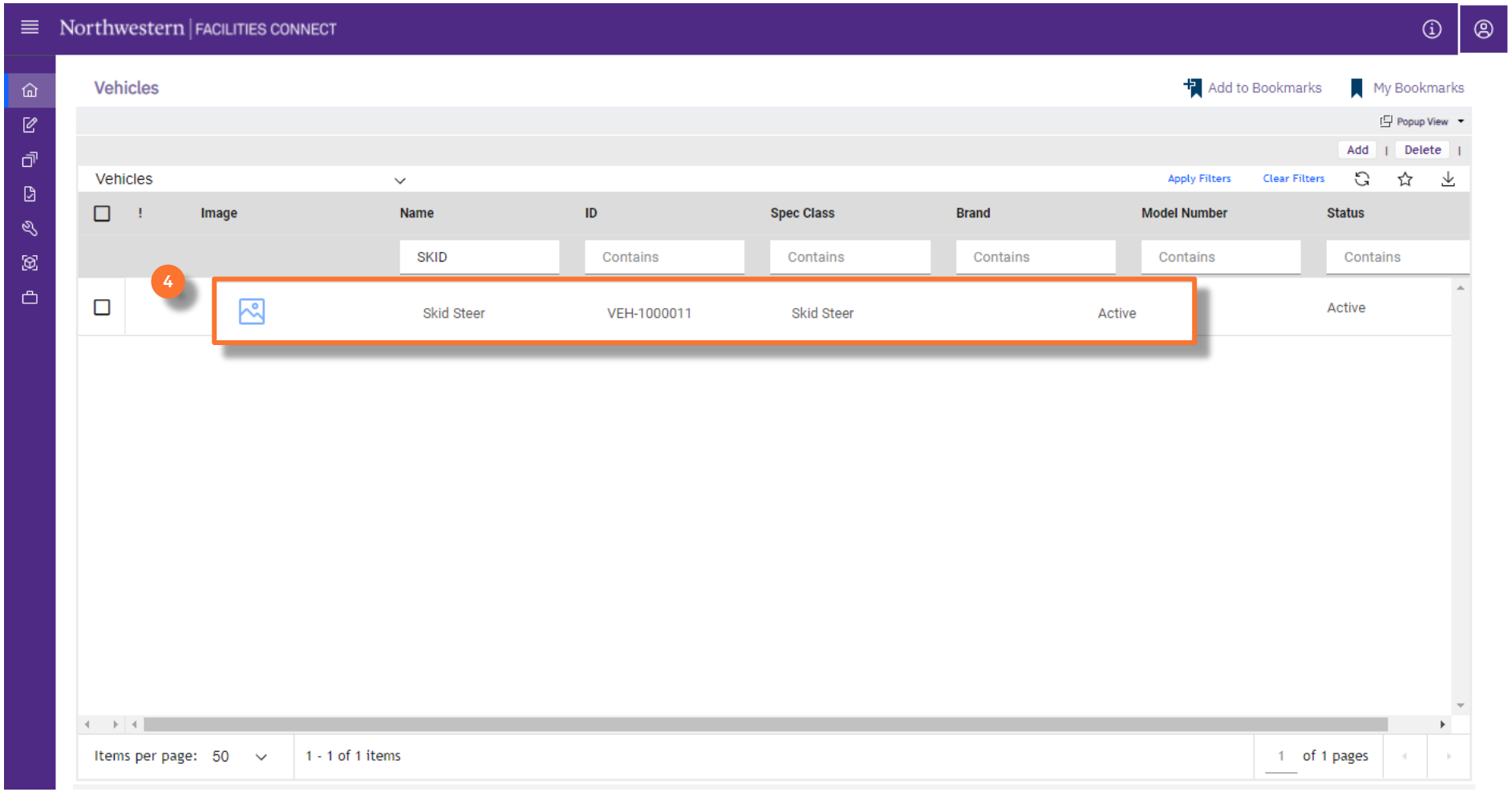
Process 1.1

Locate an Existing Specification

4) Once you have located the desired specification, click on the **Name** (i.e. Skid Steer in this example) to open the specification record.

*<<Upon clicking, the **Vehicles Specification** record will open in a new window>>*

▶ INFORMATION



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NOW VIEWING VEHICLES SPECIFICATION RECORD

▼ PROCESS

Process 1.1

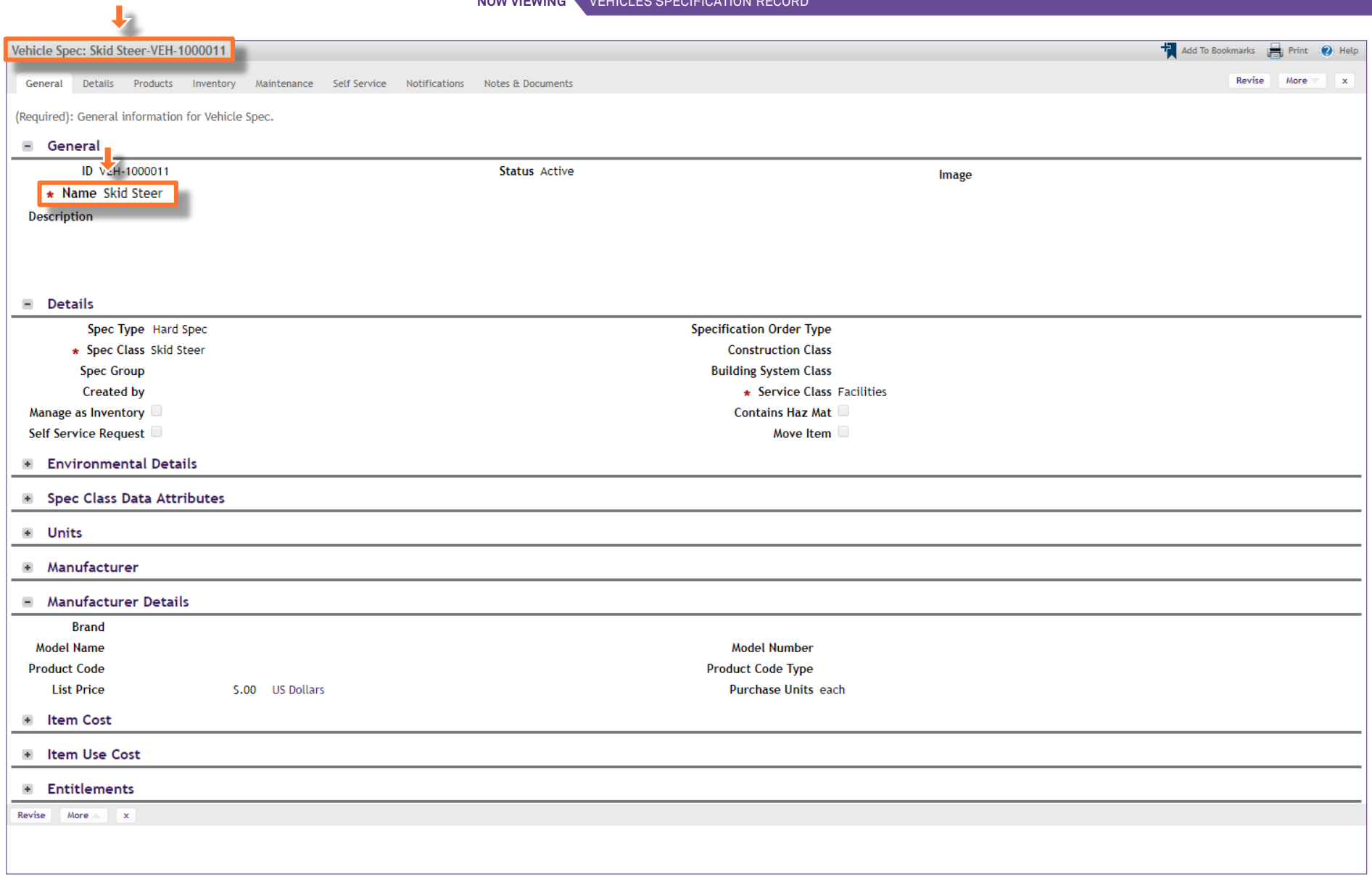
Locate an Existing Specification

The **Vehicles Specification** record, for Skid Steer in this example, is now open and accessible for review and/or editing.

End of Process

Next Process > 1.2 Review an Existing Specification

▶ INFORMATION



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PROCESS

INFORMATION

Process 1.2

Review an Existing Specification

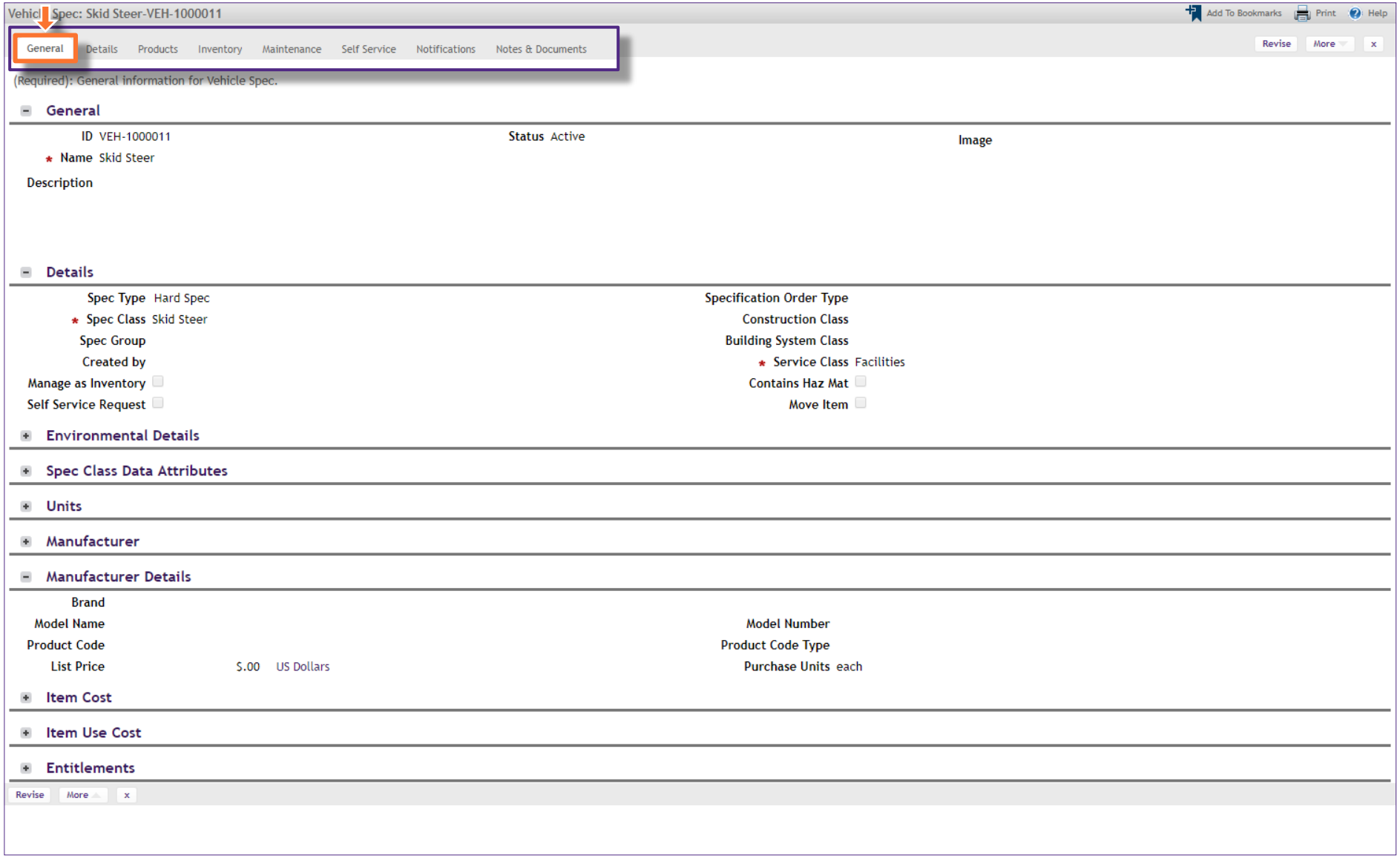
Once you have accessed a **Vehicles Specification** record, you can navigate within the record to view and/or modify information. Navigation is driven by the tab menu located at the top of the screen.

Tip: Upon opening a record, Facilities Connect will display the **General** tab (as shown on the right)

By clicking on the individual tabs, you are able to access a variety of information regarding the selected specification (see next page).

Note: Specification records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.



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PROCESS

INFORMATION

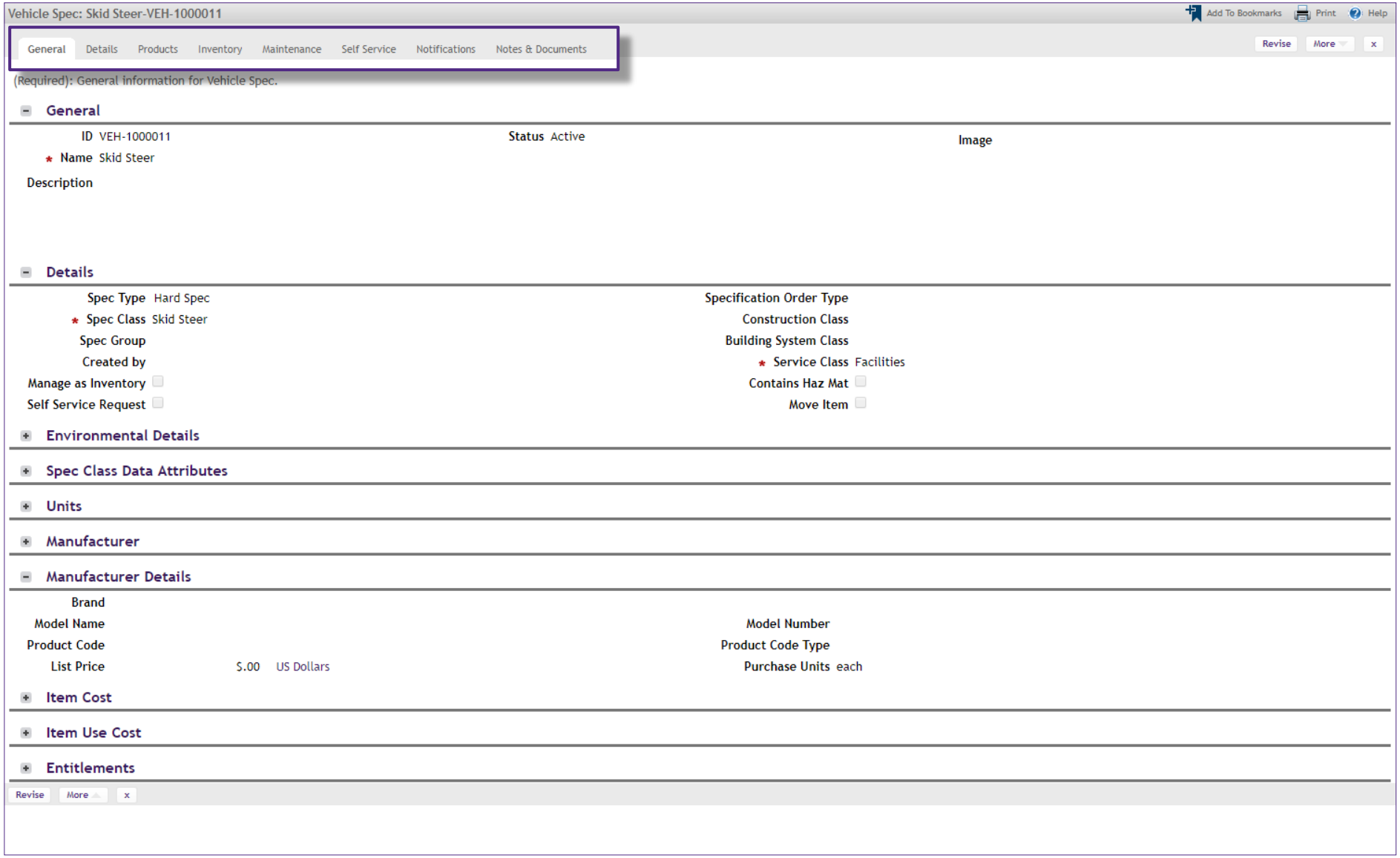
Process 1.2

Review an Existing Specification

The active tab will be highlighted (in white), indicating its contents are currently displayed.

The available tabs and their contents include:

- **General** contains specification name, type, class, service class, manufacturer, environmental details, and item cost information
- **Details** contains units of measurement, dimensions, unit ratings (e.g. capacity, voltage, amps, etc.), and underlying asset parts list
- **Products** is not used by NU Facilities
- **Inventory** provides inventory information on parts associated with the underlying asset
- **Maintenance** provides information on underlying asset life expectancy, readings, warranties, and safety plans
- **Self Service** contains available free form text fields to add / store additional descriptive and features information on the underlying asset
- **Notifications** is not used by NU Facilities
- **Notes & Documents** is a repository to add comments and attachments (e.g. photos, manuals, supporting documents, etc.)



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▼ PROCESS

Process 1.2

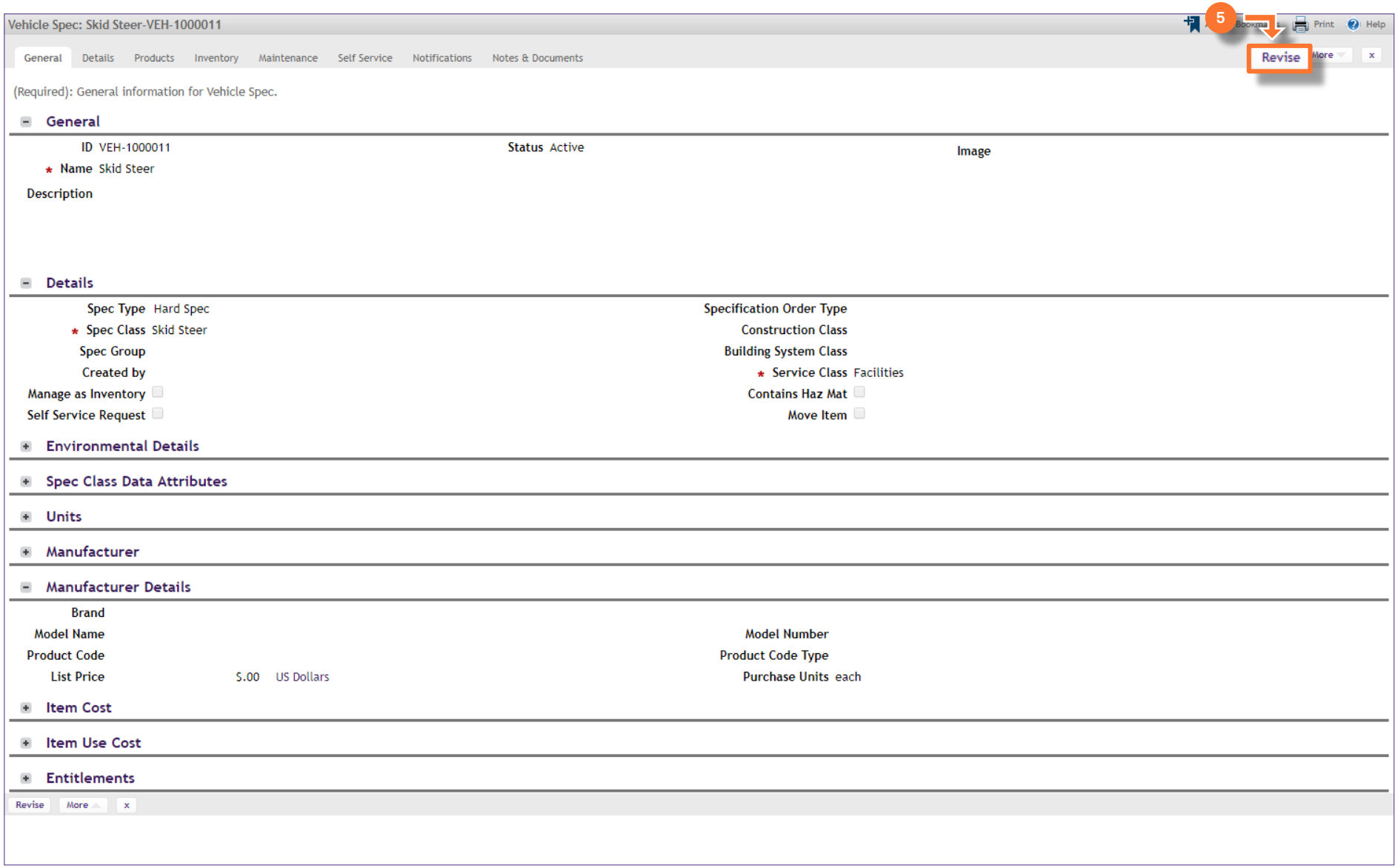
Review an Existing Specification

To modify a **Vehicles Specification** record, perform the following steps

5) Begin by clicking the **Revise** button to prepare the specification record for editing.

*<<Upon clicking, the **Vehicles Specification** record will become editable, and new action buttons will appear at the upper right of the form>>*

▶ INFORMATION



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▼ PROCESS

Process 1.2

Review an Existing Specification

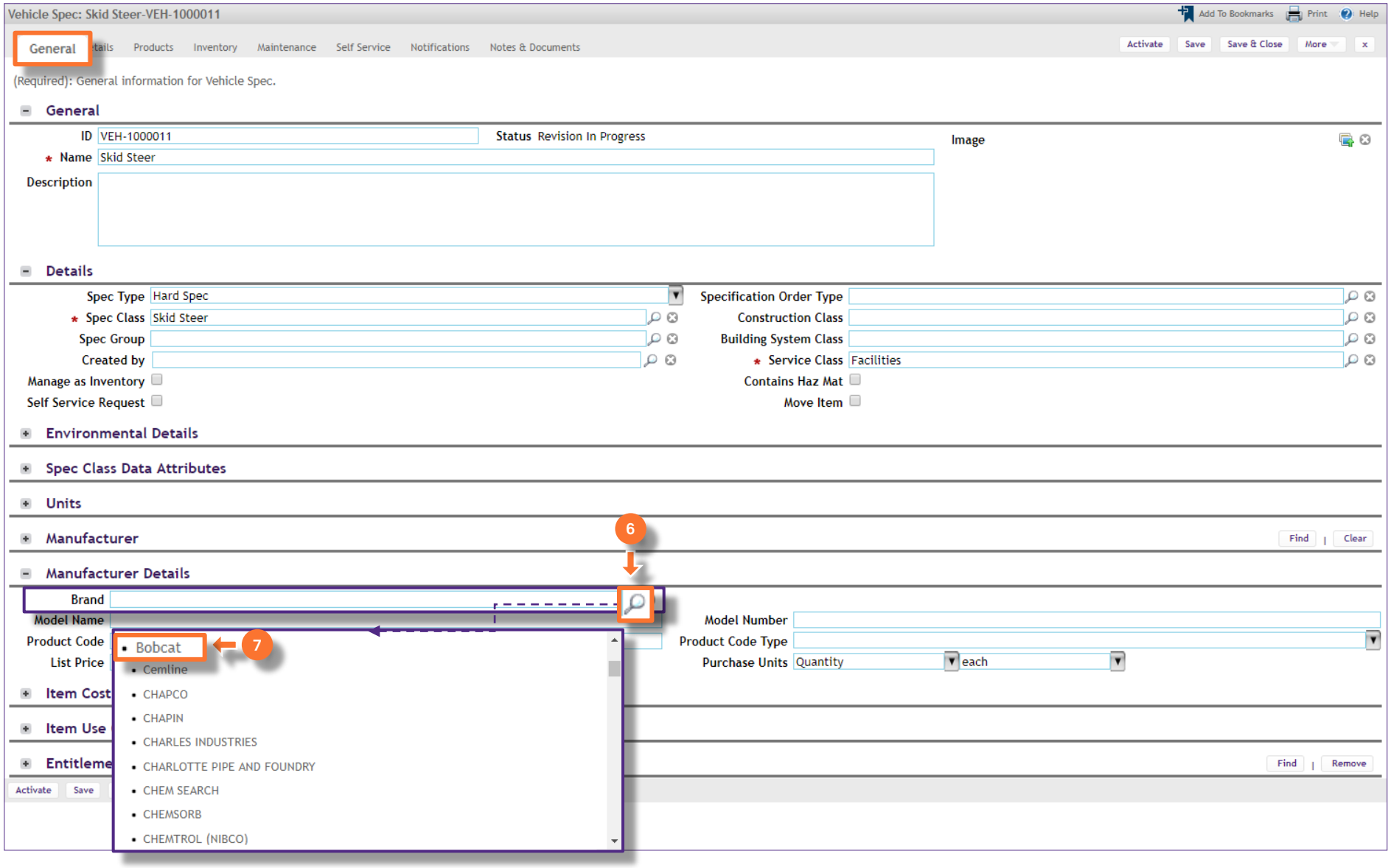
Next, identify the field(s) across the various tabs to be modified.

For this example, we will update the Manufacturer Details section with a **Brand** and **Model Name**.

6) To locate the desired **Brand**, click the **Magnifying Glass** icon (immediately to the right of the field)

7) Upon clicking, a listing of available brands will appear immediately below. Locate the desired **Brand**, and click to select.

▶ INFORMATION



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▼ PROCESS

Process 1.2

Review an Existing Specification

Next, add a **Model Name**.

8) Type the **Model Name** into the field.

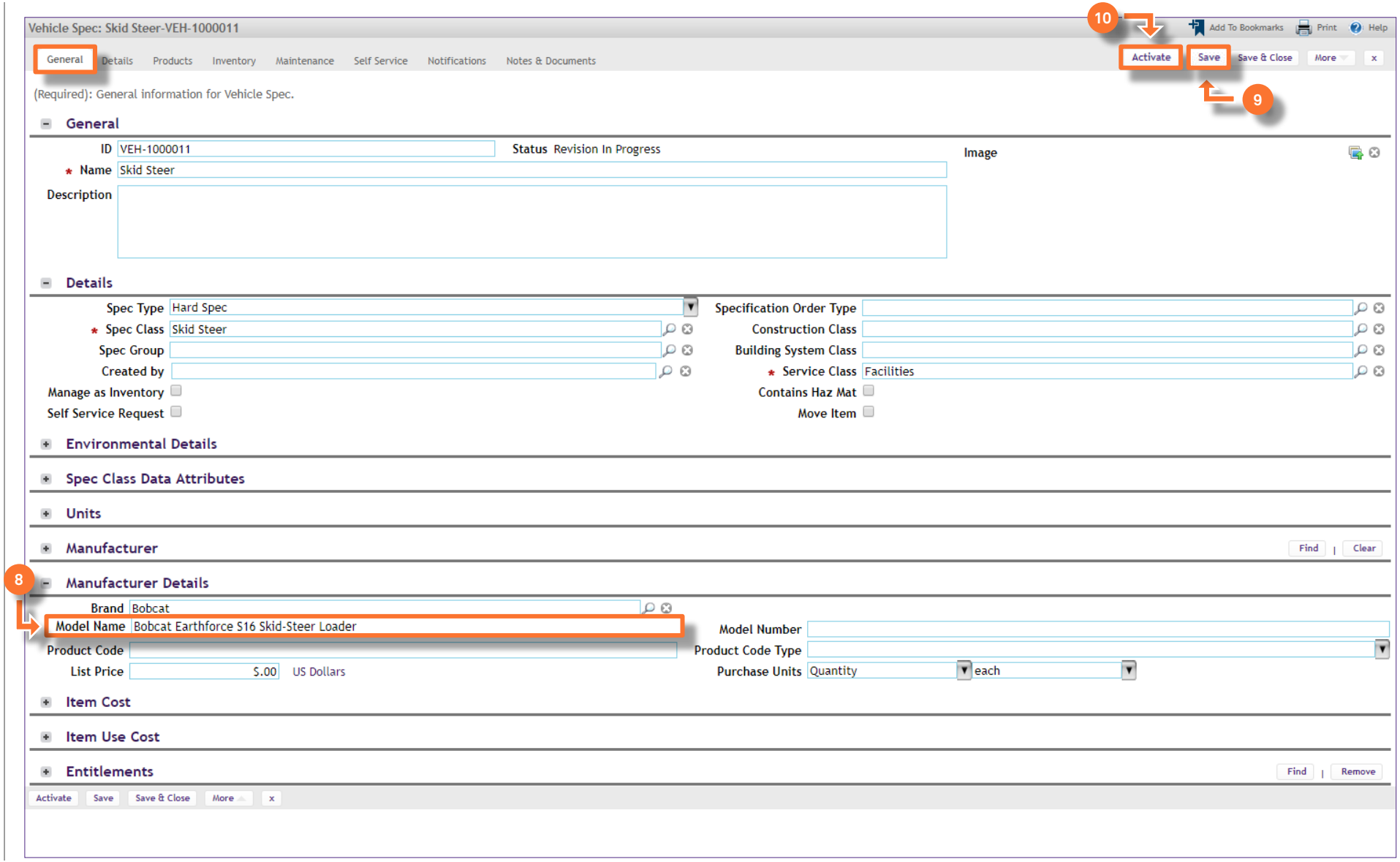
9) As you complete modifications to a **Vehicles Specification** record, it's good practice to save your work by clicking on the **Save** button.

10) Once all modifications have been recorded, click the **Activate** button to save and exit.

End of Process

Next Process > 1.3 Create an New Specification

▶ INFORMATION



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▼ PROCESS

Process 1.3

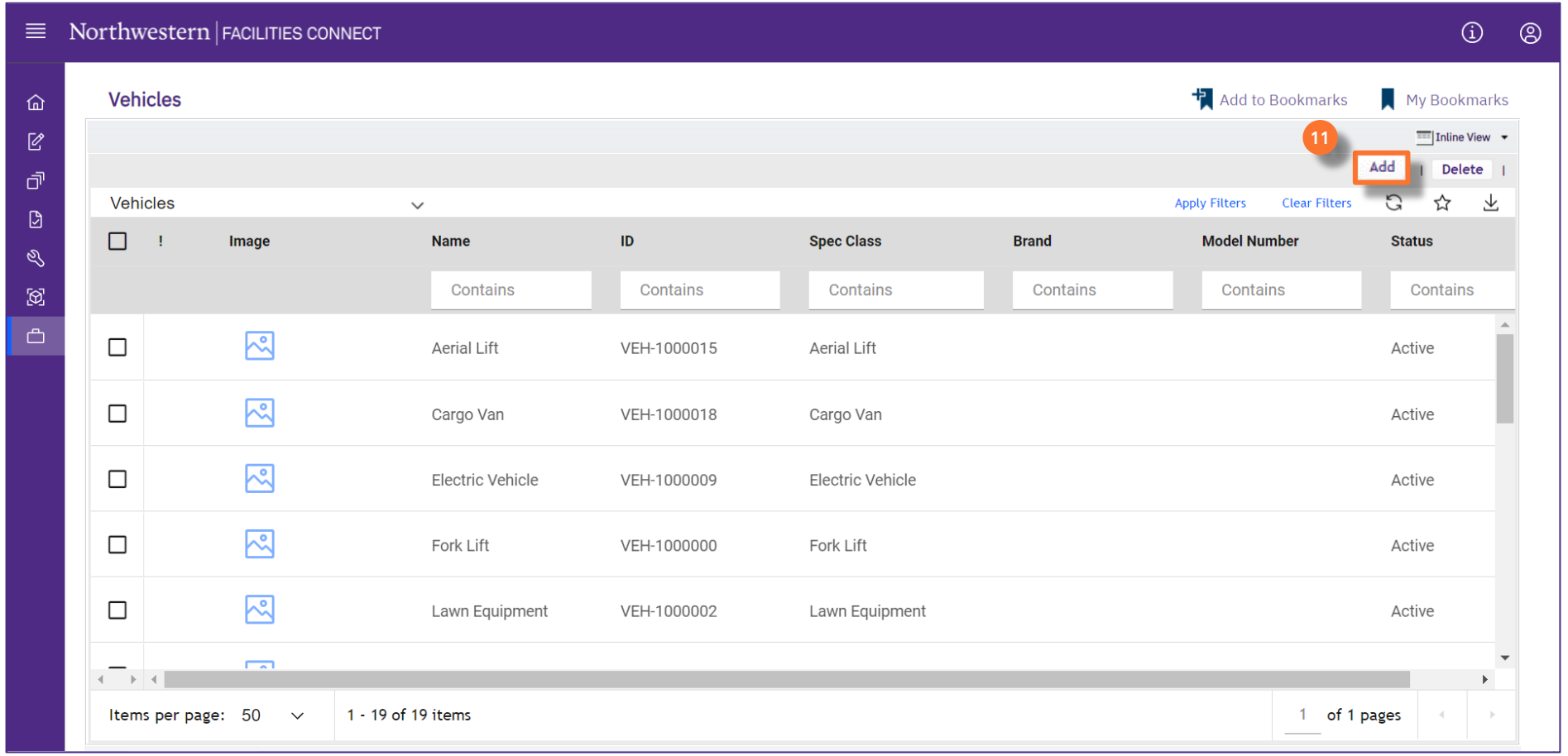
Create a New Specification

Following Step #2, on the **Vehicles Specification** screen:

11) Click the **Add** button to open a new Vehicles Specification record form

*<<Upon clicking, a blank **Vehicles Specification** record will open in a new window>>*

▶ INFORMATION



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▼ PROCESS

Process 1.3

Create a New Specification

Beginning on the **General** tab, there are three (3) required fields which must be updated in order to save the new specification record. These fields are **Name**, **Specification (Spec) Class**, and **Service Class**.

12) First, add a name for the new specification by typing directly into the **Name** field.

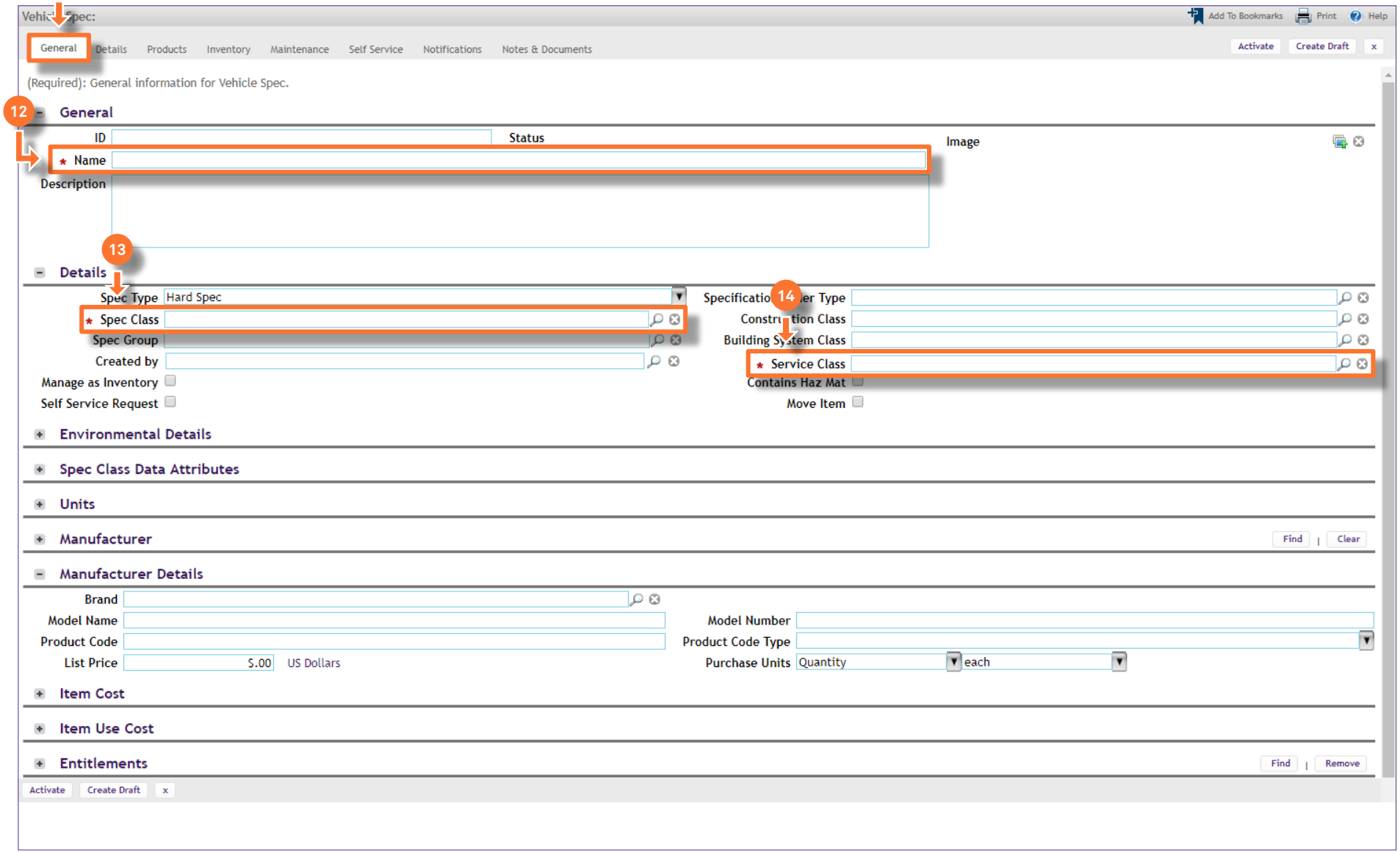
13) Next, update the **Specification (Spec) Class**; click on the **Magnifying Glass** (immediately to the right of the field) and select the appropriate **Spec Class**.

14) Then, update the **Service Class**; click on the **Magnifying Glass** (immediately to the right of the field) and select the appropriate **Service Class**.

Note: Specification records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.

▶ INFORMATION



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▼ PROCESS

Process 1.3

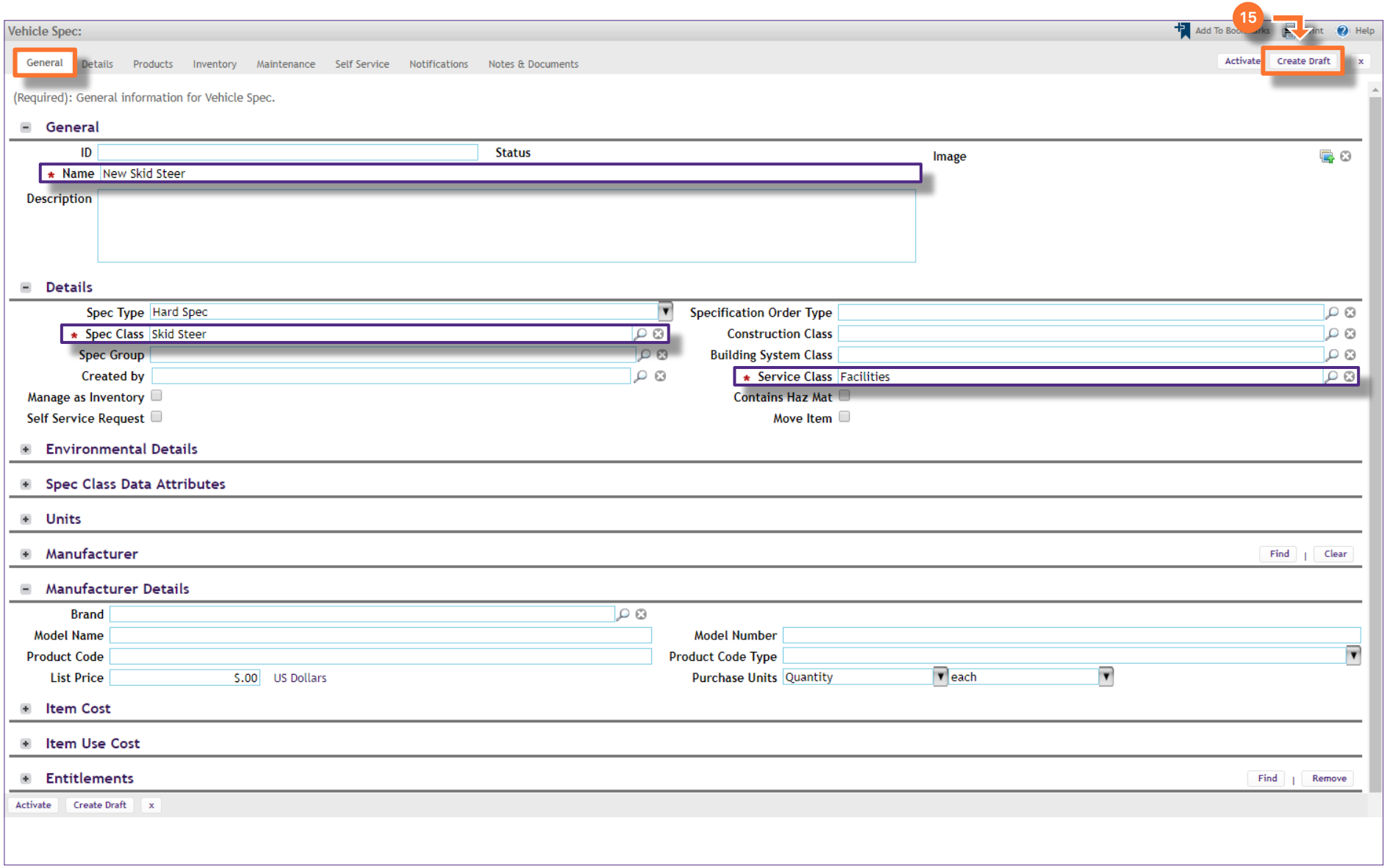
Create a New Specification

Once each of the three (3) required fields have been updated:

15) Create a draft of your new **Vehicles Specification**; click on the **Create Draft** button (upper right of the form)

*<<Upon clicking, the **Vehicles Specification** record is saved, and new action buttons will appear at the upper right of the form>>*

▶ INFORMATION



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▼ PROCESS

Process 1.3

Create a New Specification

The new **Vehicles Specification** has now been saved in Facilities Connect.

You may continue to navigate and update this specification using the record tabs located at the top of the screen.

16) As you complete modifications to a **Vehicle Specification** record, it's good practice to save your work by clicking on the **Save** button.

17) Once all modifications have been recorded, click the **Activate** button to save and exit.

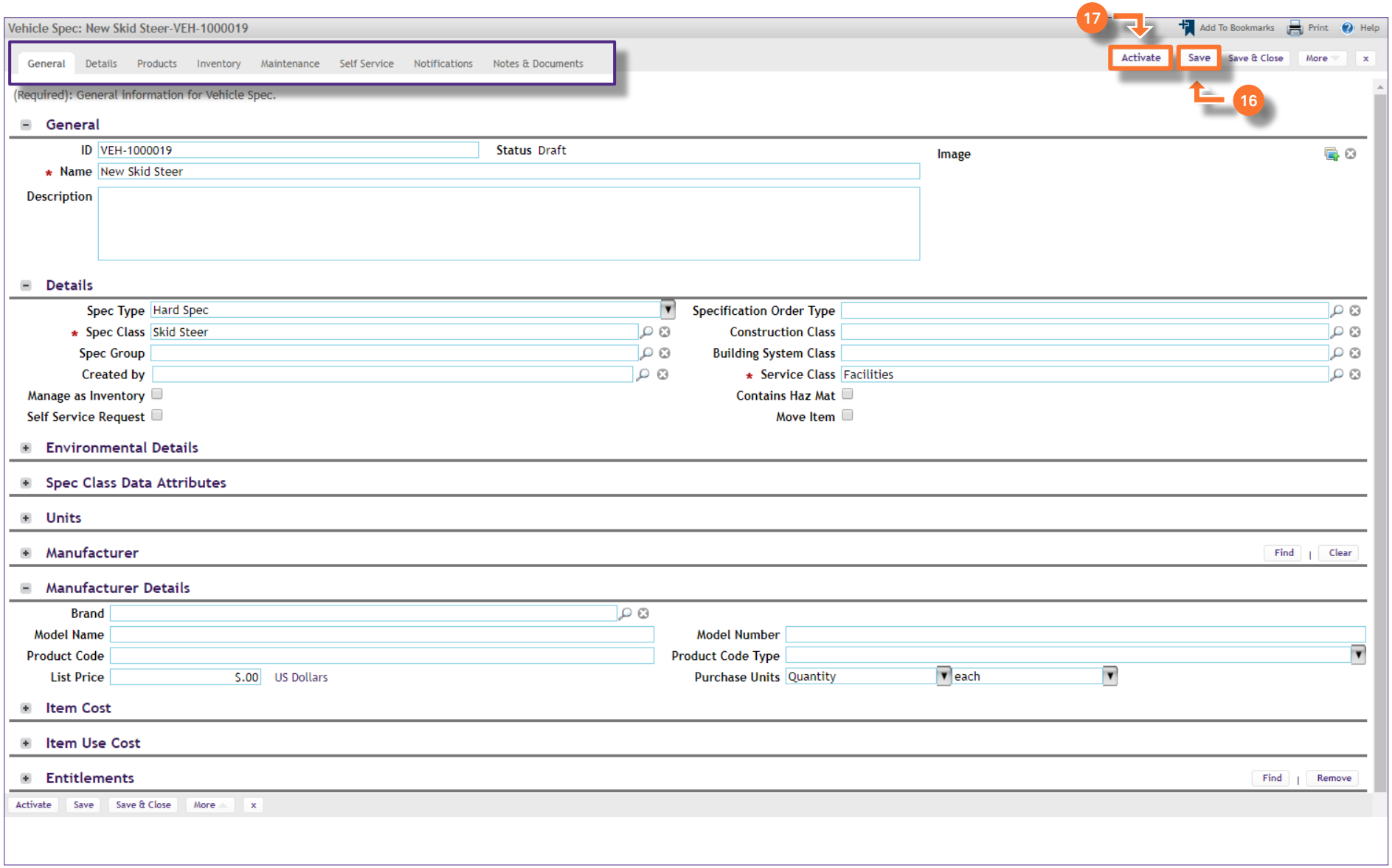
Note: Specification records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.

End of Process

Next Process > 2.1 Locate an Existing Asset

▶ INFORMATION



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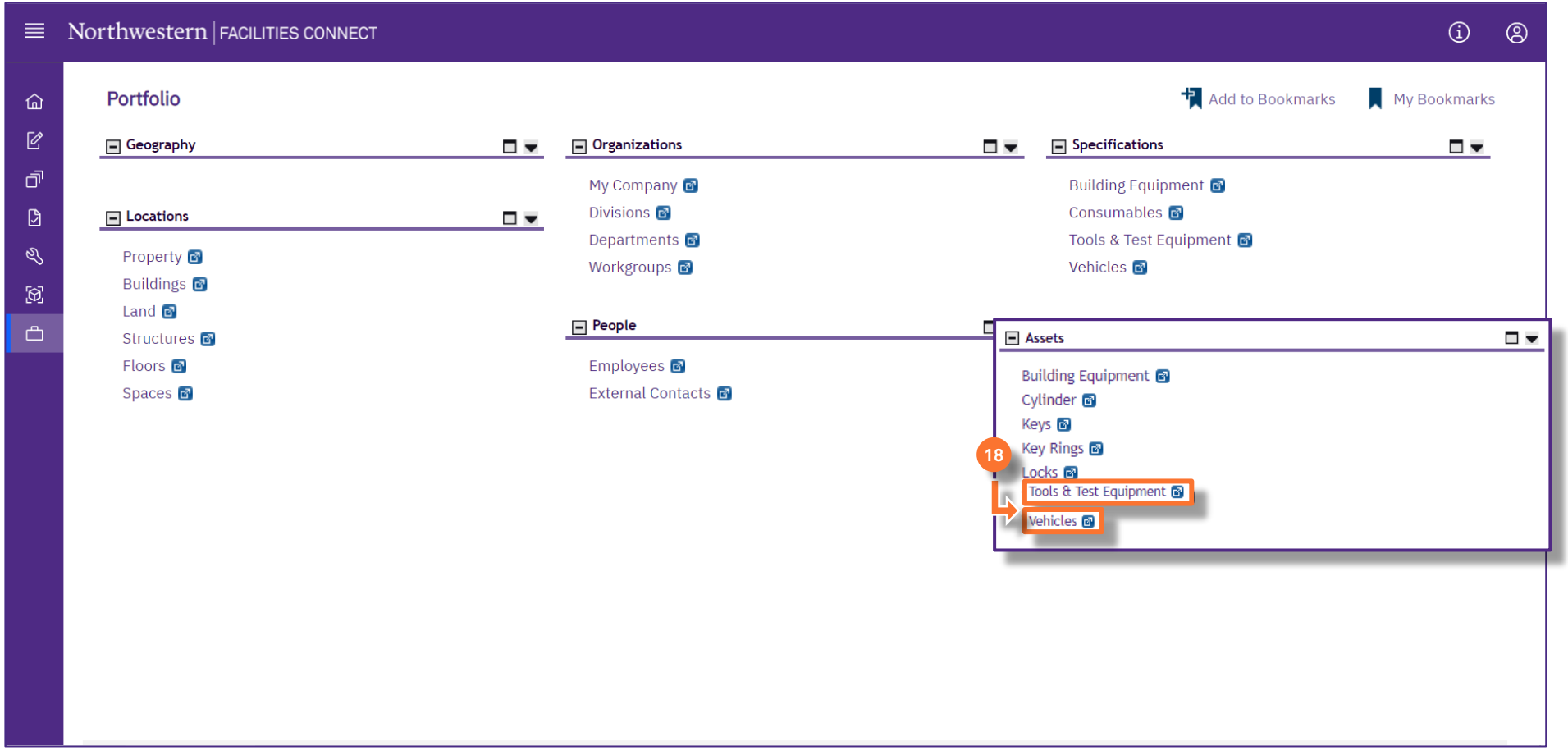
▼ PROCESS

When working with **Vehicles** or **Tools & Test Equipment**, asset and specification information is accessible via the **Vehicles** and **Tools & Test Equipment** options respectively, located on each menu.

18) To access assets, click on the option labeled **Vehicles**, located within the **Assets** menu

*<<Upon clicking, the **Vehicles Asset** screen will open in the main window>>*

▶ INFORMATION



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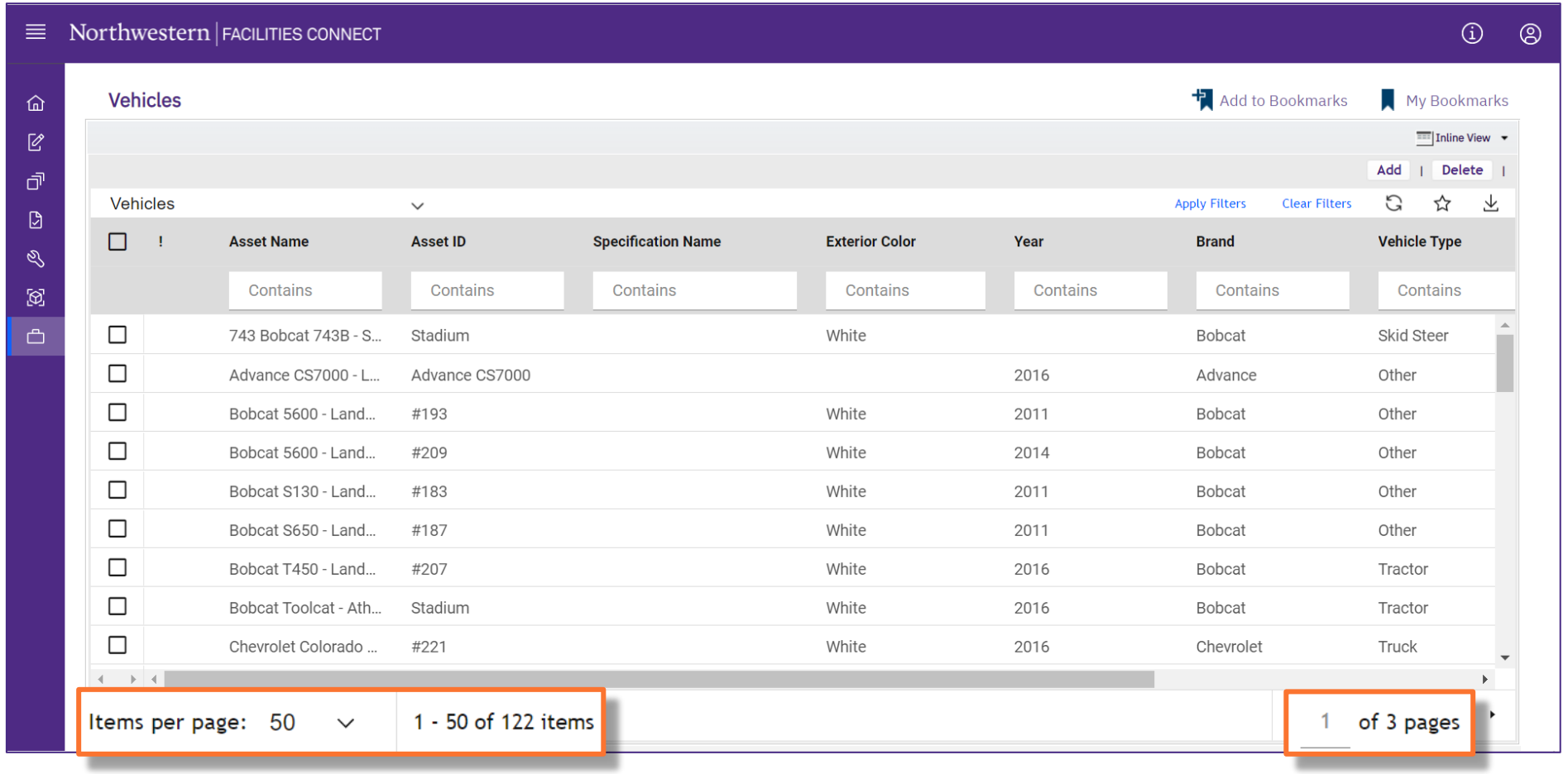
PROCESS

INFORMATION

On the **Vehicles Asset** screen, you are able to locate and access an existing vehicle asset, or create a new vehicle asset in Facilities Connect.

Note: On this tab, always be aware of the number of items present within each section (shown on the **Information Bar**)

As a default, Facilities Connect will display the first ten (10) items in each section. This can be adjusted by changing the number of visible records via the **Show** dropdown on the right side of each section



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▼ PROCESS

Process 2.1

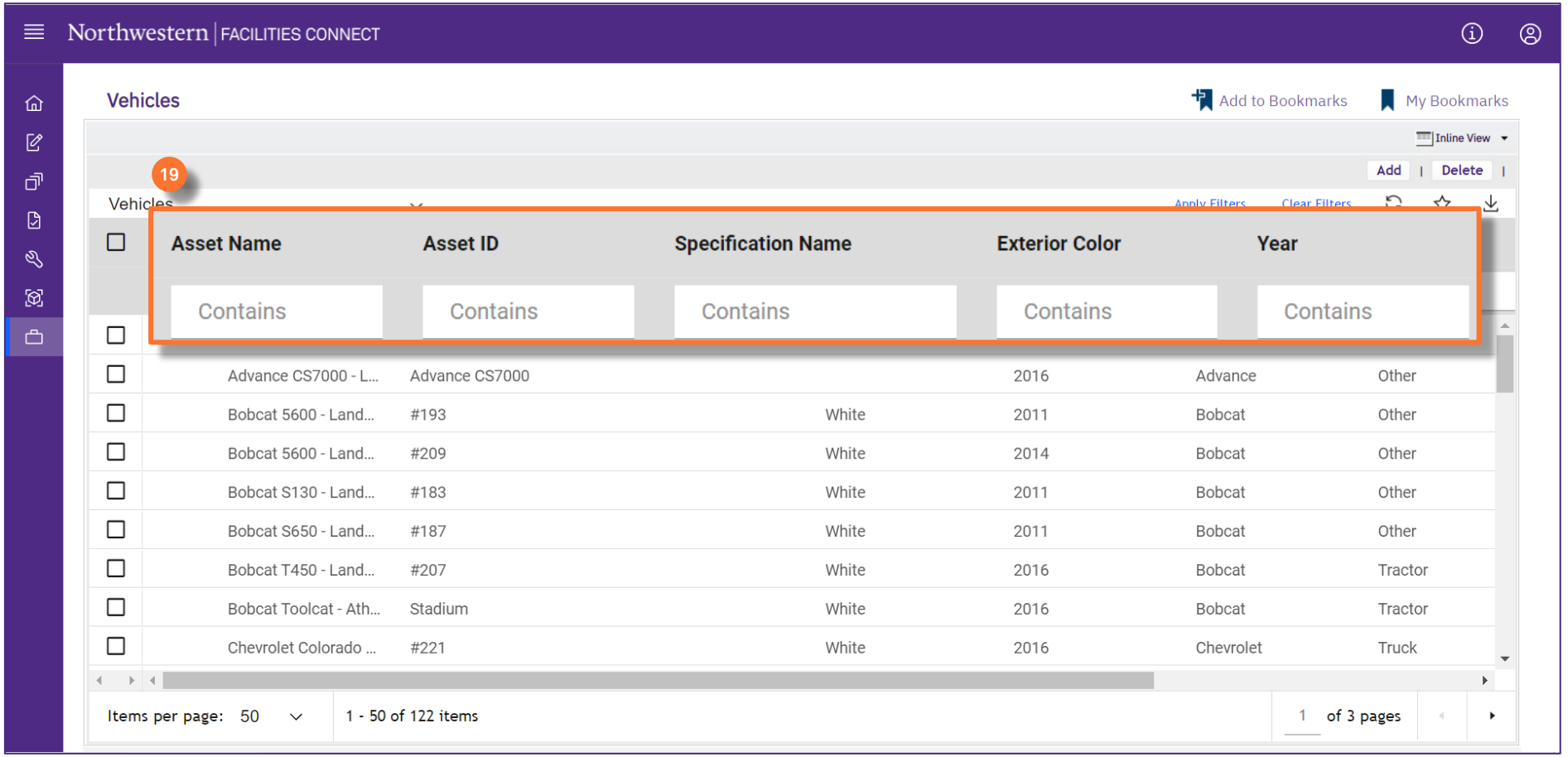
Locate an Existing Asset

Following Step #18, on the **Vehicles Asset** screen:

19) Use available **Sort / Filter** functionality to locate a desired asset.

- To **Sort**, click on any column header (e.g. Asset Name, Asset ID, Specification Name, Location, etc.) to toggle an ascending / descending sort order for the contents of the column.
- To **Filter**, type your desired criteria into one (or multiple) white filter box(es) beneath the column header row. Once all the criteria has been added, press the **Enter** key to filter results below.

▶ INFORMATION



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▼ PROCESS

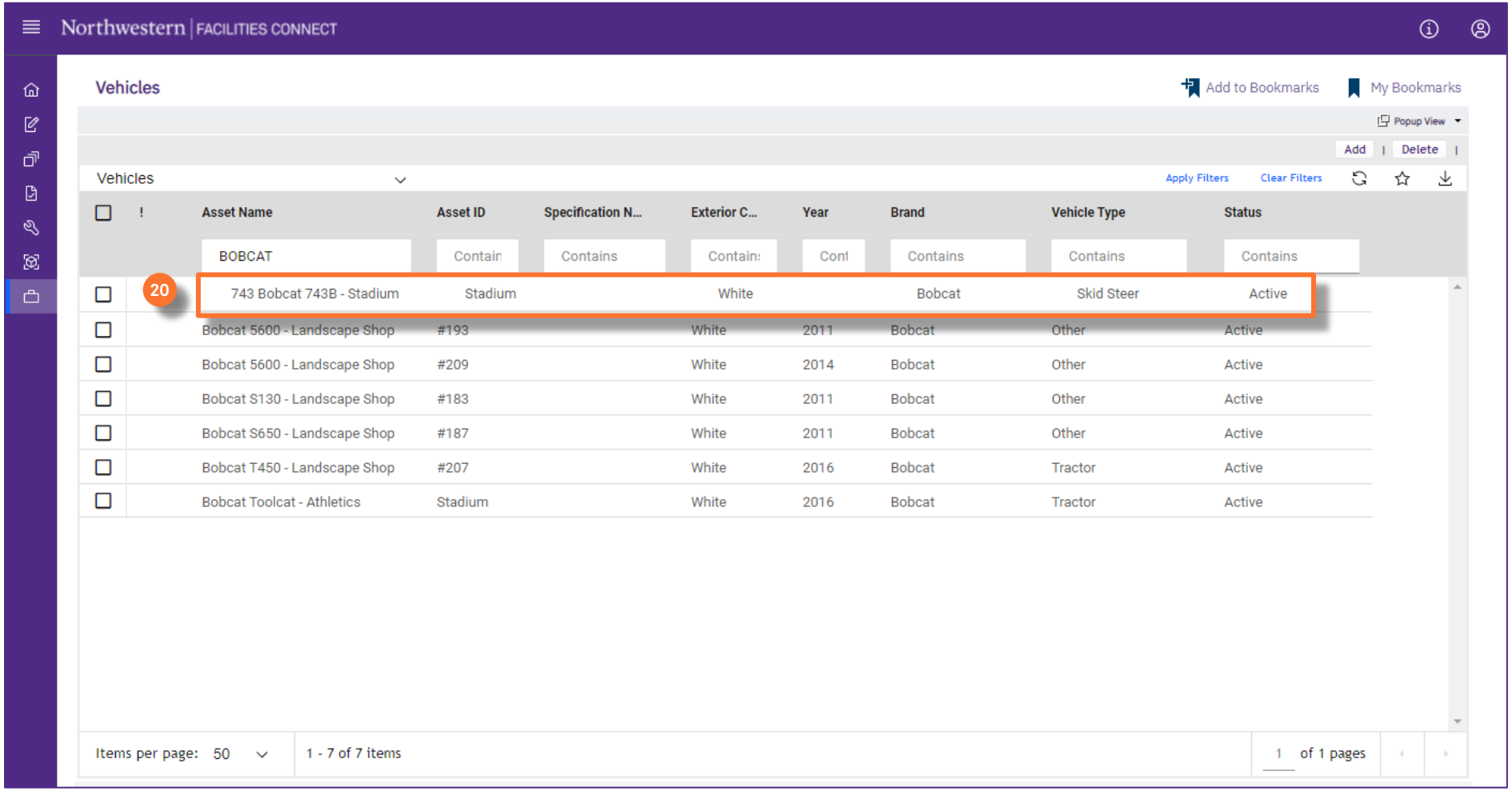
Process 2.1

Locate an Existing Asset

20) Once you have located the desired asset, click on the **Name** (i.e. Bobcat Toolcat) to open the asset record.

*<<Upon clicking, the **Vehicles Asset** record will open in a new window>>*

▶ INFORMATION



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NOW VIEWING | VEHICLES ASSET RECORD

PROCESS

Process 2.1

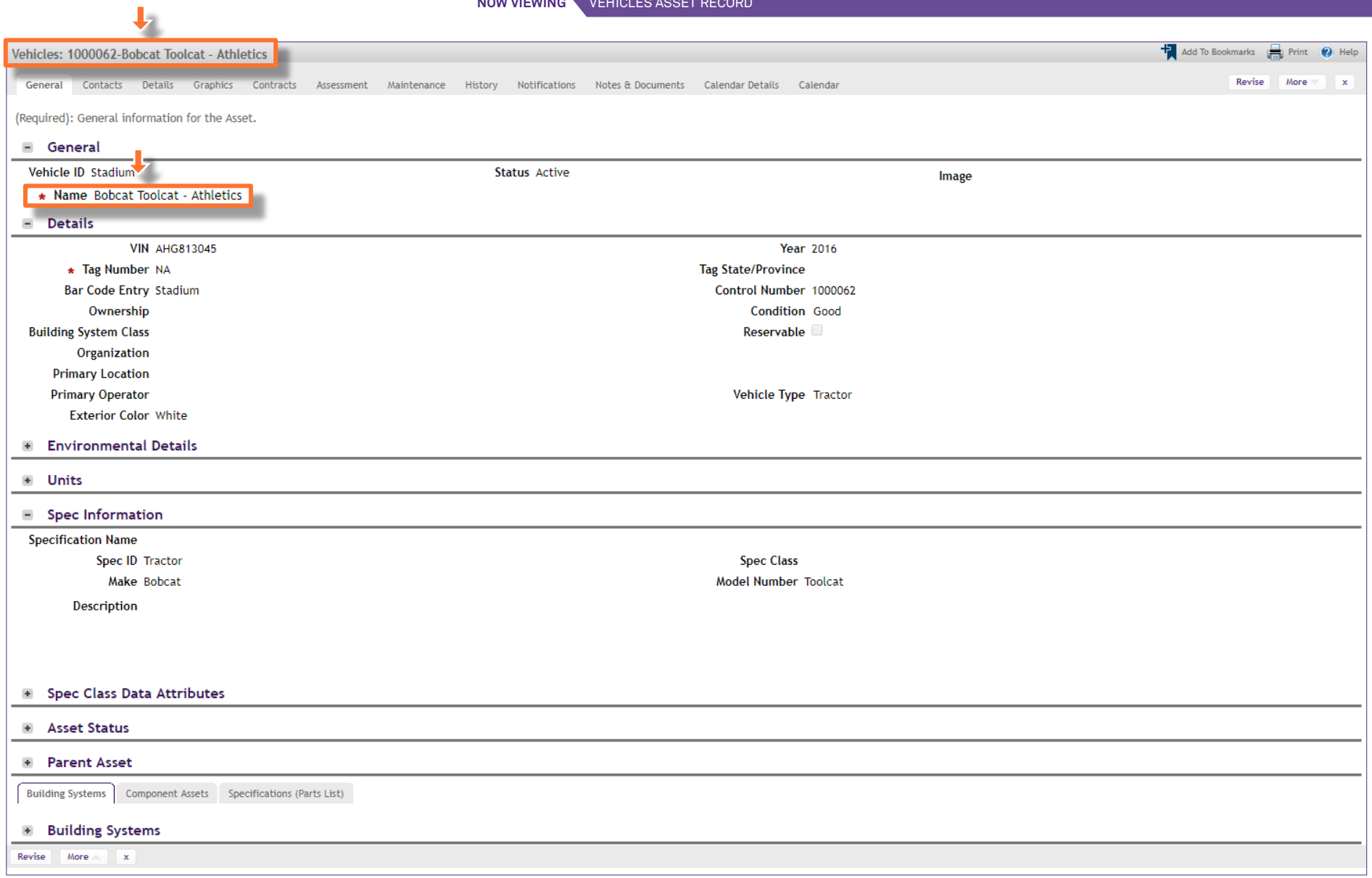
Locate an Existing Asset

The **Vehicles Asset** record, for Bobcat Toolcat in this example, is now open and accessible for review and/or editing.

End of Process

Next Process > 2.2 Review an Existing Asset

INFORMATION



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PROCESS

INFORMATION

Process 2.2

Review an Existing Asset

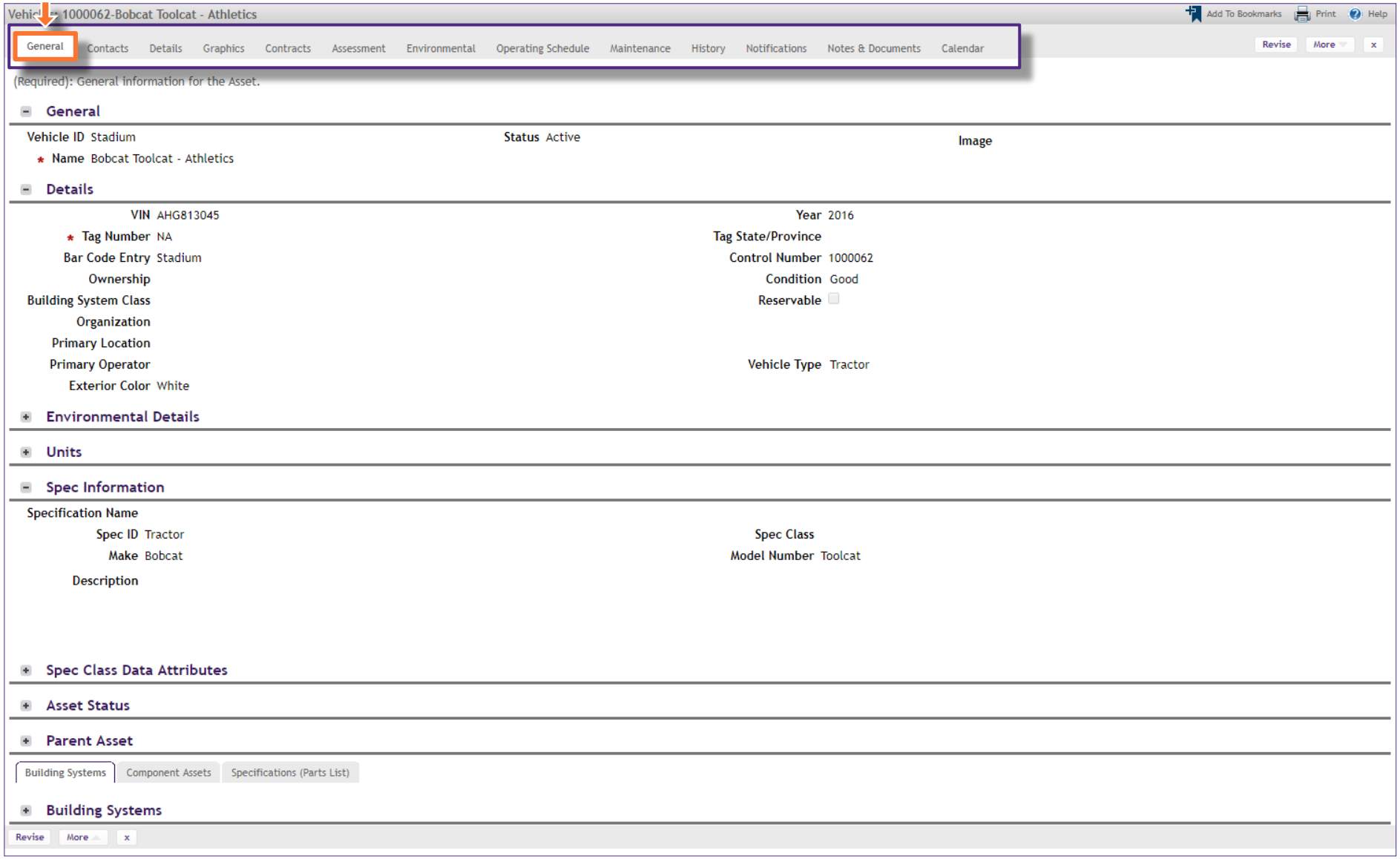
Once you have accessed an asset record (i.e. following step #18), you can navigate within the **Vehicles Asset** record to view and/or modify asset information. Navigation is driven by the tab menu located at the top of the screen.

Tip: Upon opening a record, Facilities Connect will display the **General** tab (as shown on the right)

By clicking on the individual tabs, you are able to access a variety of information regarding the selected asset (see next page).

Note: Asset records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.



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PROCESS

INFORMATION

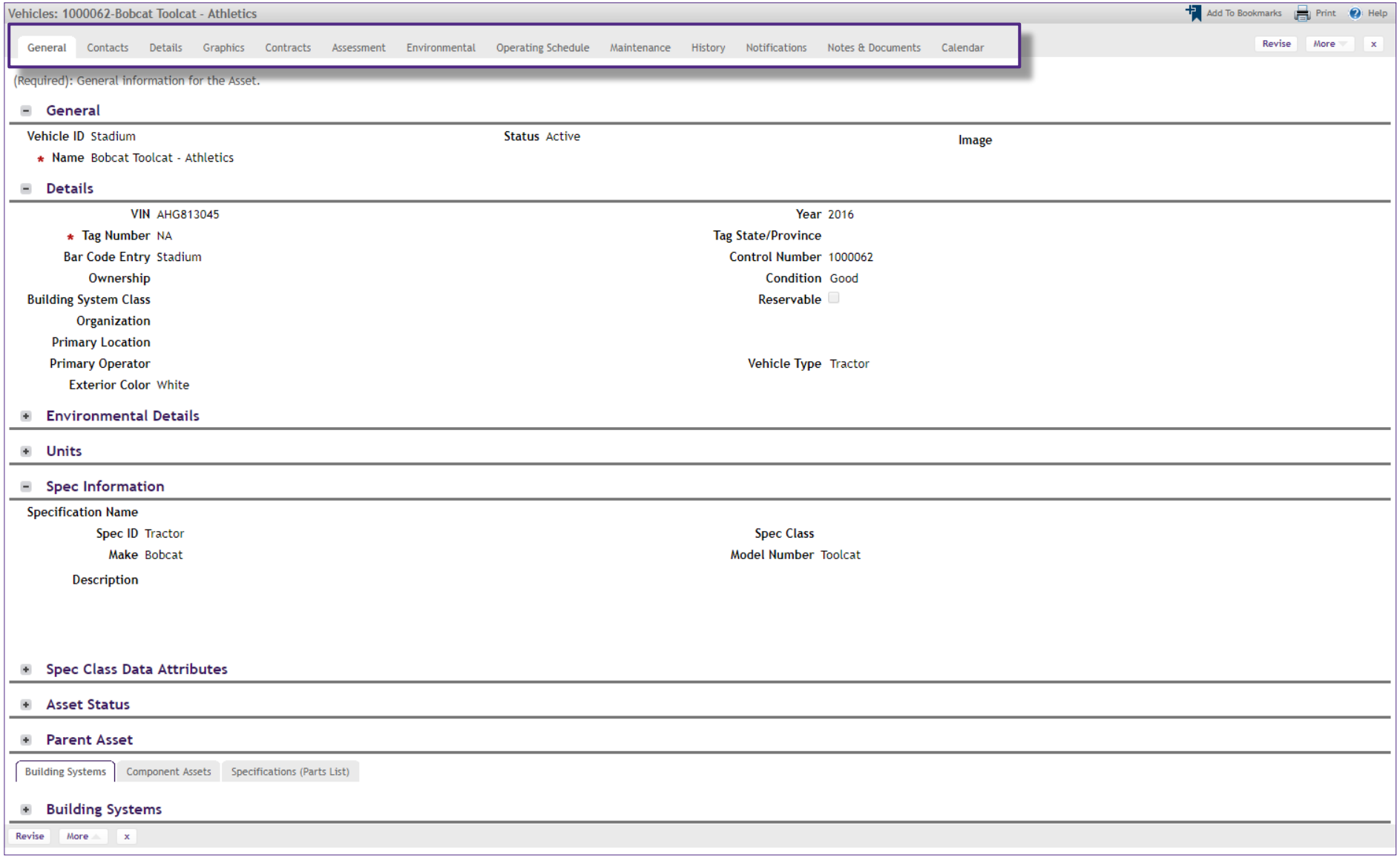
Process 2.2

Review an Existing Asset

The active tab will be highlighted (in white), indicating its contents are currently displayed.

The available tabs and their contents include:

- **General** contains asset name, ID, serial number, location, associated specification, and asset status information
- **Contacts** contains the names and contact information for individuals associated with selected the asset
- **Details** contains information such as asset units of measurement, dimensions, and ratings (e.g. capacity, voltage, amps, etc.)
- **Graphics** contains the floor plan and graphical reporting tools for the location of the asset on campus
- **Contracts** is not used by NU Facilities
- **Assessment** provides asset service date, life expectancy, and condition index information
- **Environmental** provides detailed environmental and energy rating information
- **Operating Schedule** is not used by NU Facilities
- **Maintenance** provides asset PM schedules, warranties, readings, and safety plans
- **History** contains asset transaction, move, downtime, and MTBF logs
- **Notifications** is not used by NU Facilities



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PROCESS

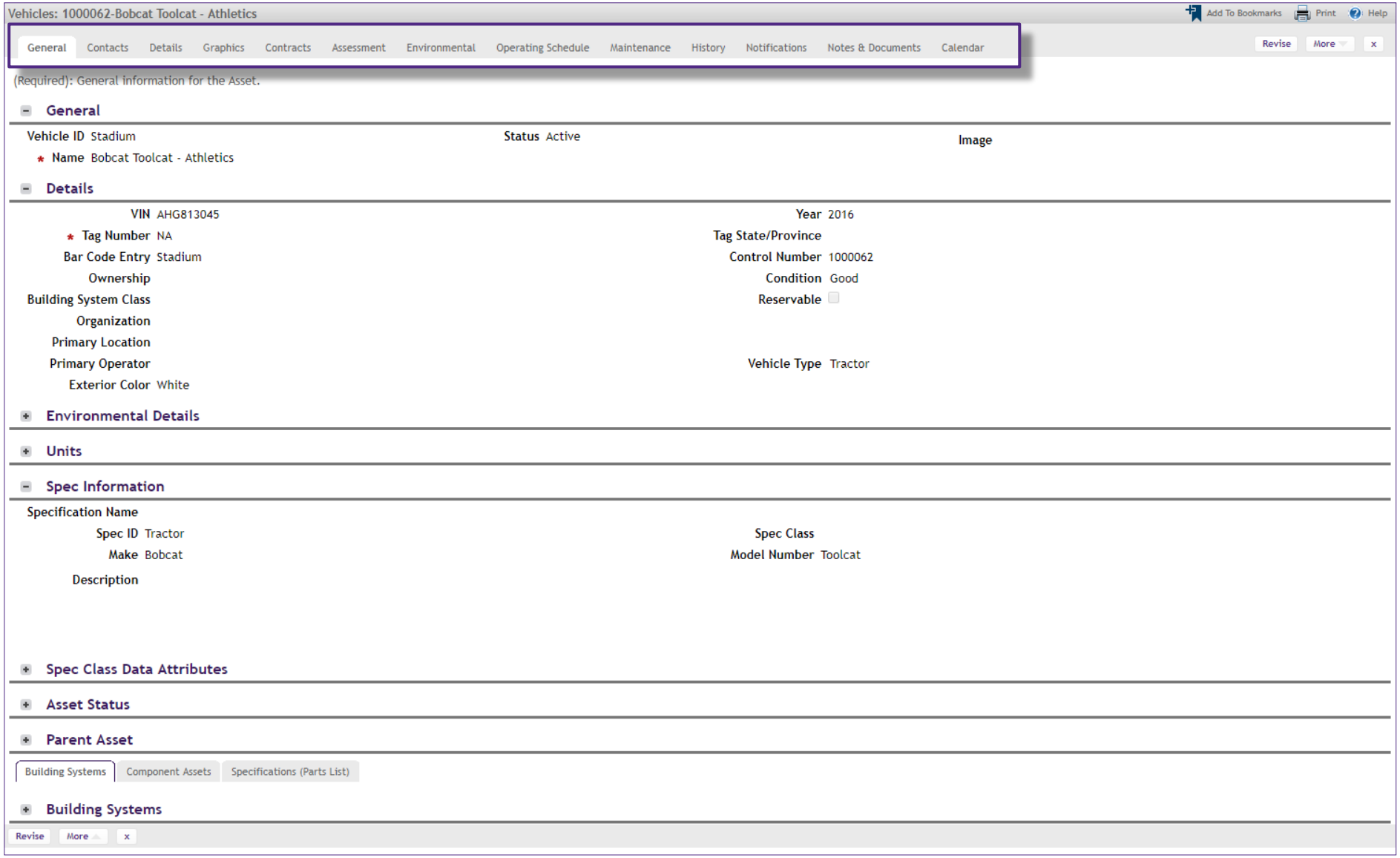
INFORMATION

Process 2.2

Review an Existing Asset

The available tabs and their contents include (continued):

- **Notes & Documents** is a repository to add comments and attachments (e.g. photos, manuals, supporting documents, etc.)
- **Calendar** is not used by NU Facilities



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▼ PROCESS

Process 2.2

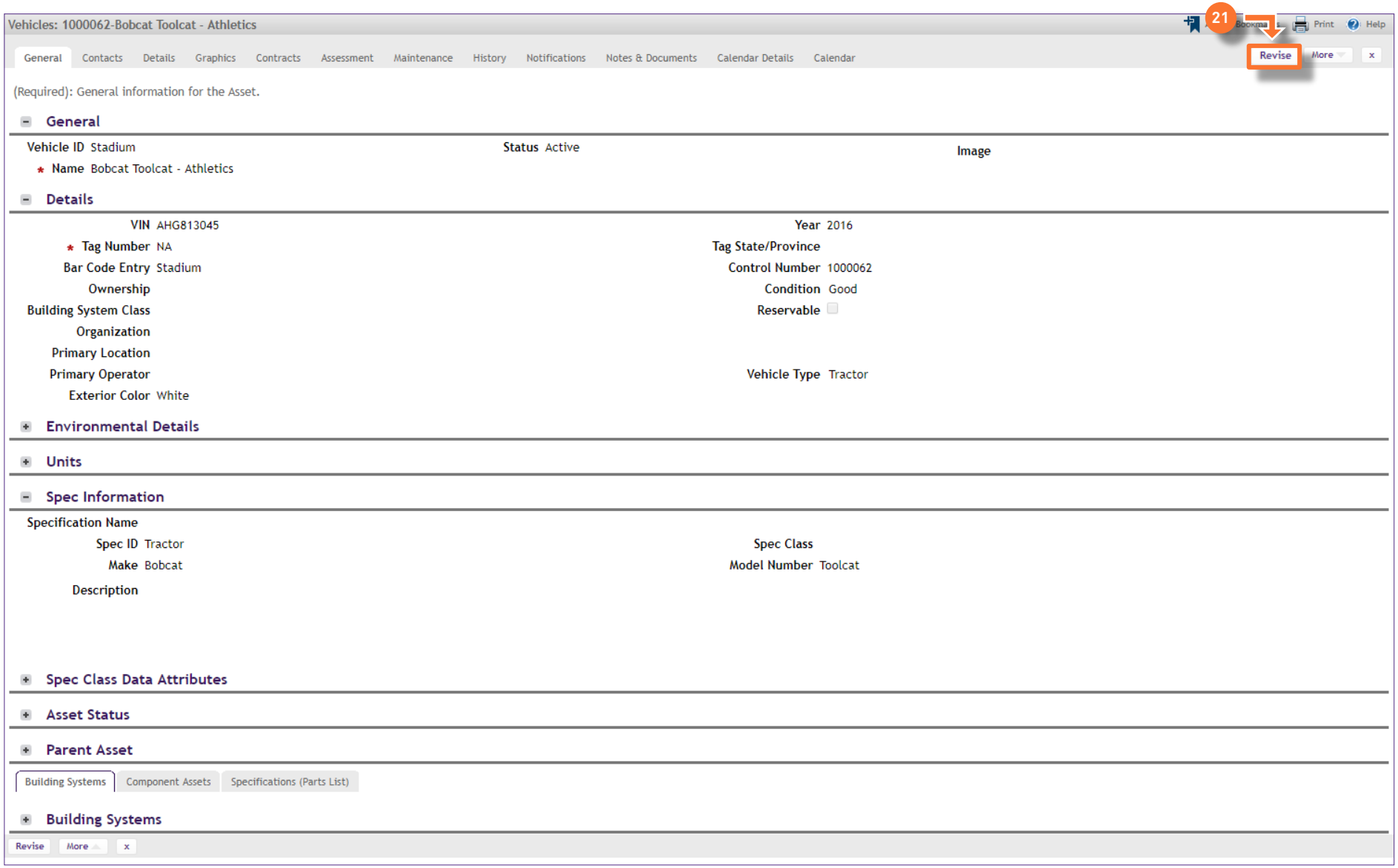
Review an Existing Asset

To modify a **Vehicles Asset** record, perform the following steps

21) Begin by clicking the **Revise** button to prepare the asset record for editing.

*<<Upon clicking, the **Vehicles Asset** record will become editable, and new action buttons will appear at the upper right of the form>>*

▶ INFORMATION



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▼ PROCESS

Process 2.2

Review an Existing Asset

Next, identify the field(s) to be modified across the various tabs of the asset record.

As an example, we will change the asset's location on campus by updating the **Primary Location** field.

22) Locate the **Primary Location** field; click the **Magnifying Glass** icon to search and select a new desired location

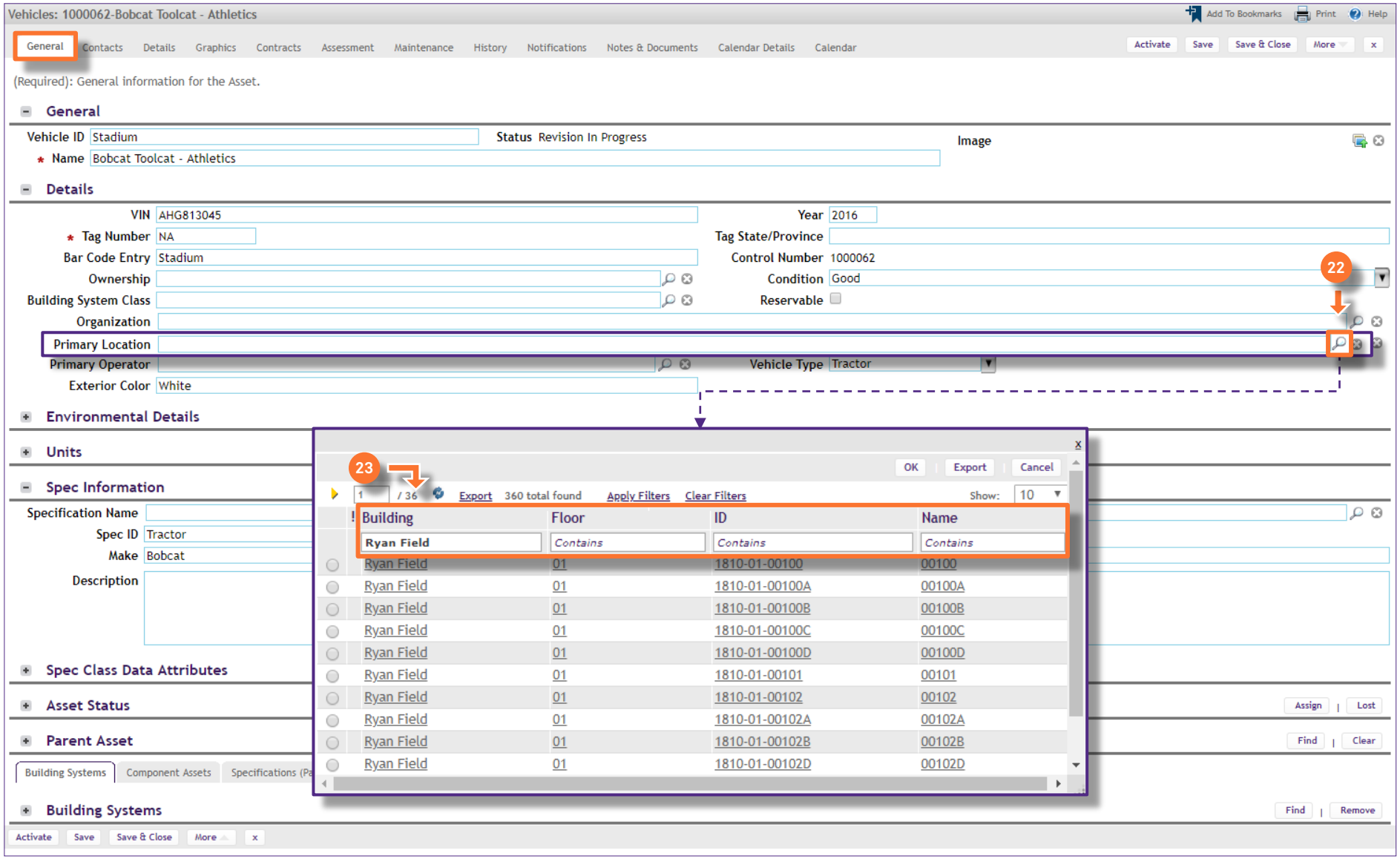
<<Upon clicking, a new search window will open>>

23) In the search window, enter search criteria in the available **Search Fields** to filter the list of locations. Once entered, press the **Enter** key to filter the list.

Search Tips

1. **When entering criteria, "less is more"**
   Facilities Connect can search partial names (e.g. "Tech" for Technological Institute)
2. **Pay attention to field information / formats**
   Acknowledge naming, spelling, and presence of leading zeroes in each column (e.g. for Floor, "03" is used instead of "3")
3. **Some fields contain multiple pieces of info**
   The Name field contains Wing and Room # and ID contains Building #, Wing, and Room#; (e.g. searching "A" in the Name field will return all A Wing rooms)

▶ INFORMATION



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▼ PROCESS

Process 2.2

Review an Existing Asset

24) Once you have located the desired location, click on the corresponding **radio button**, and then click **OK** to select

*<<Upon clicking, the search window will close and the **Primary Location** field will display the new location>>*

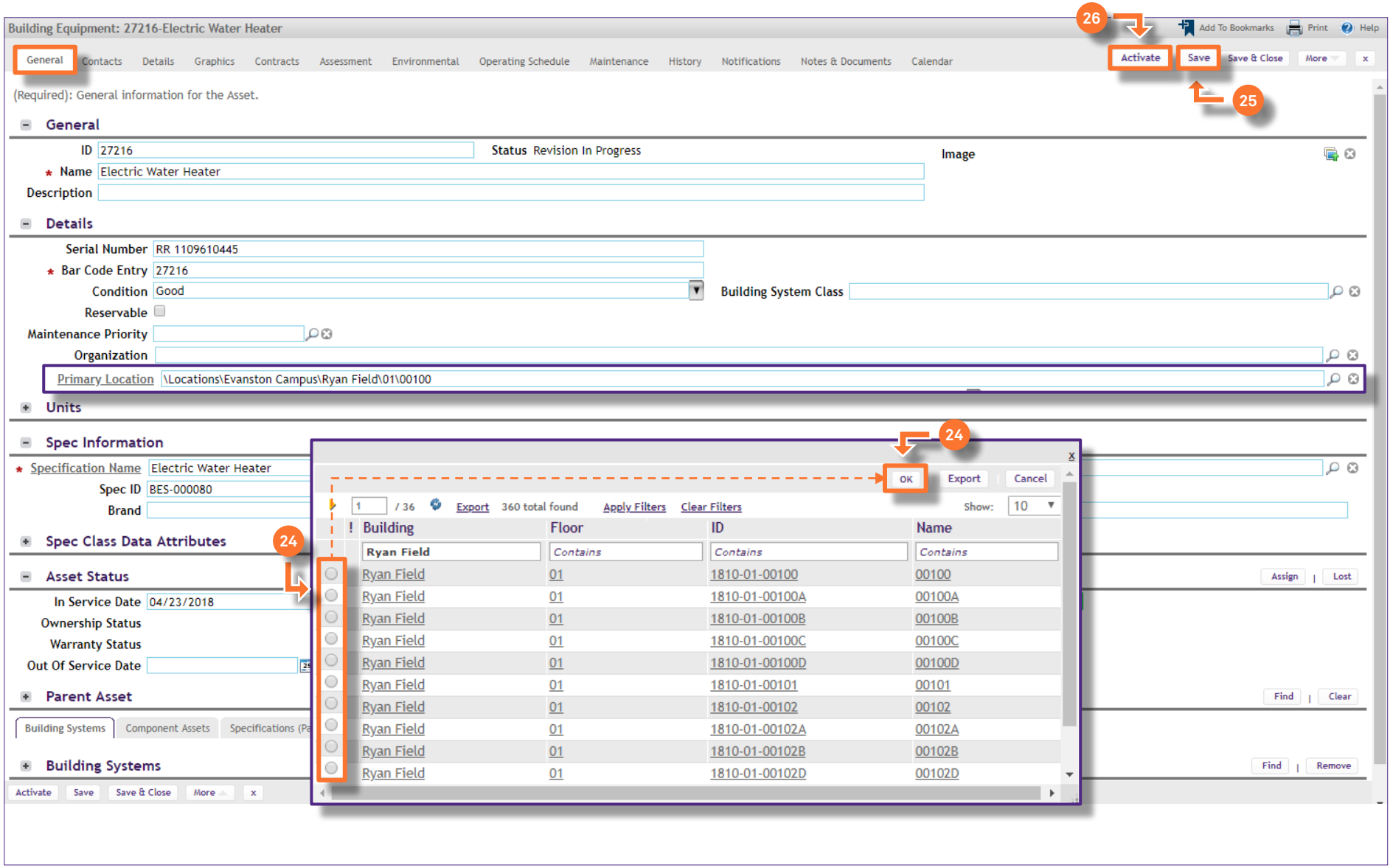
25) As you complete modifications to a Vehicles Asset record, it's good practice to save your work by clicking on the **Save** button.

26) Once all modifications have been recorded, click the **Activate** button to save and exit.

End of Process

Next Process > 2.3 Create a New Asset

▶ INFORMATION



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Process 2.3

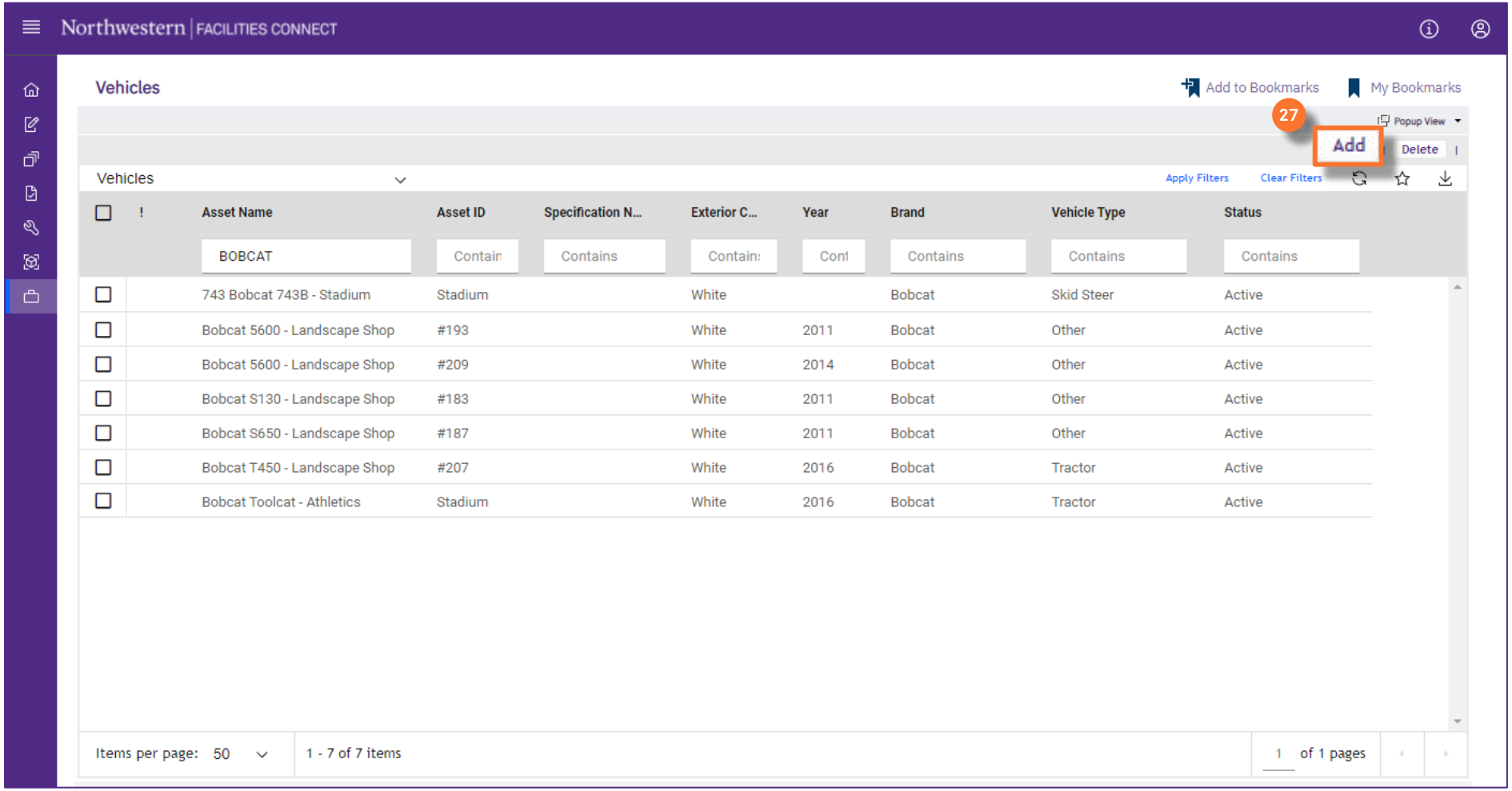
Create a New Asset

Following Step #18, on the **Vehicles Asset** screen:

27) Click the **Add** button to open a new Vehicles Asset record form

*<<Upon clicking, a blank **Vehicles Asset** record will open in a new window>>*

▶ INFORMATION



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▼ PROCESS

Process 2.3

Create a New Asset

Beginning on the **General** tab, there are two (2) required fields which must be updated in order to save the new asset record. These fields are **Name** and **Tag Number**.

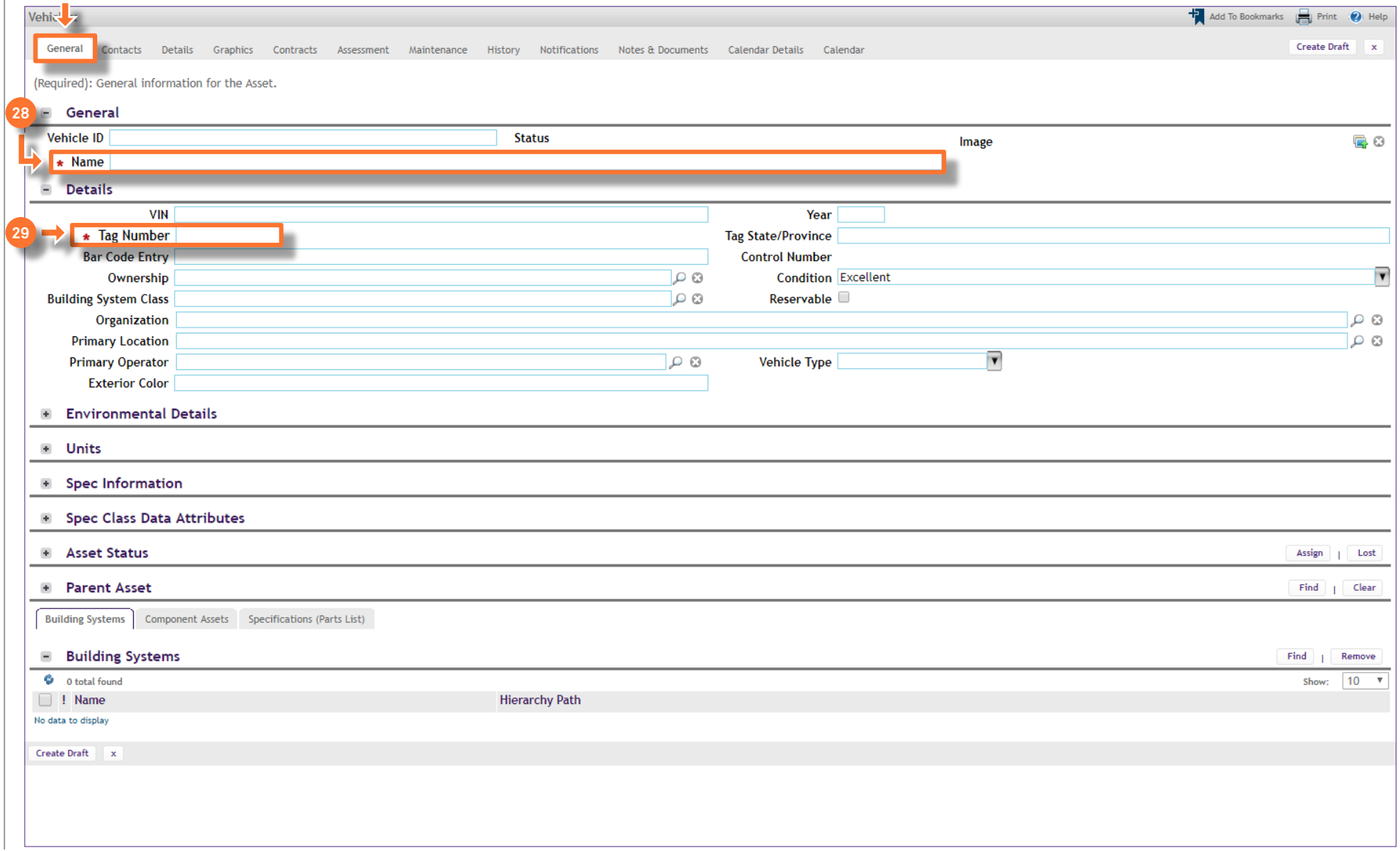
28) First, add a name for the new asset; type the name directly into the **Name** field.

29) Next, add the new asset's tag number in the **Tag Number** field.

Note: Asset records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.

▶ INFORMATION



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▼ PROCESS

Process 2.3

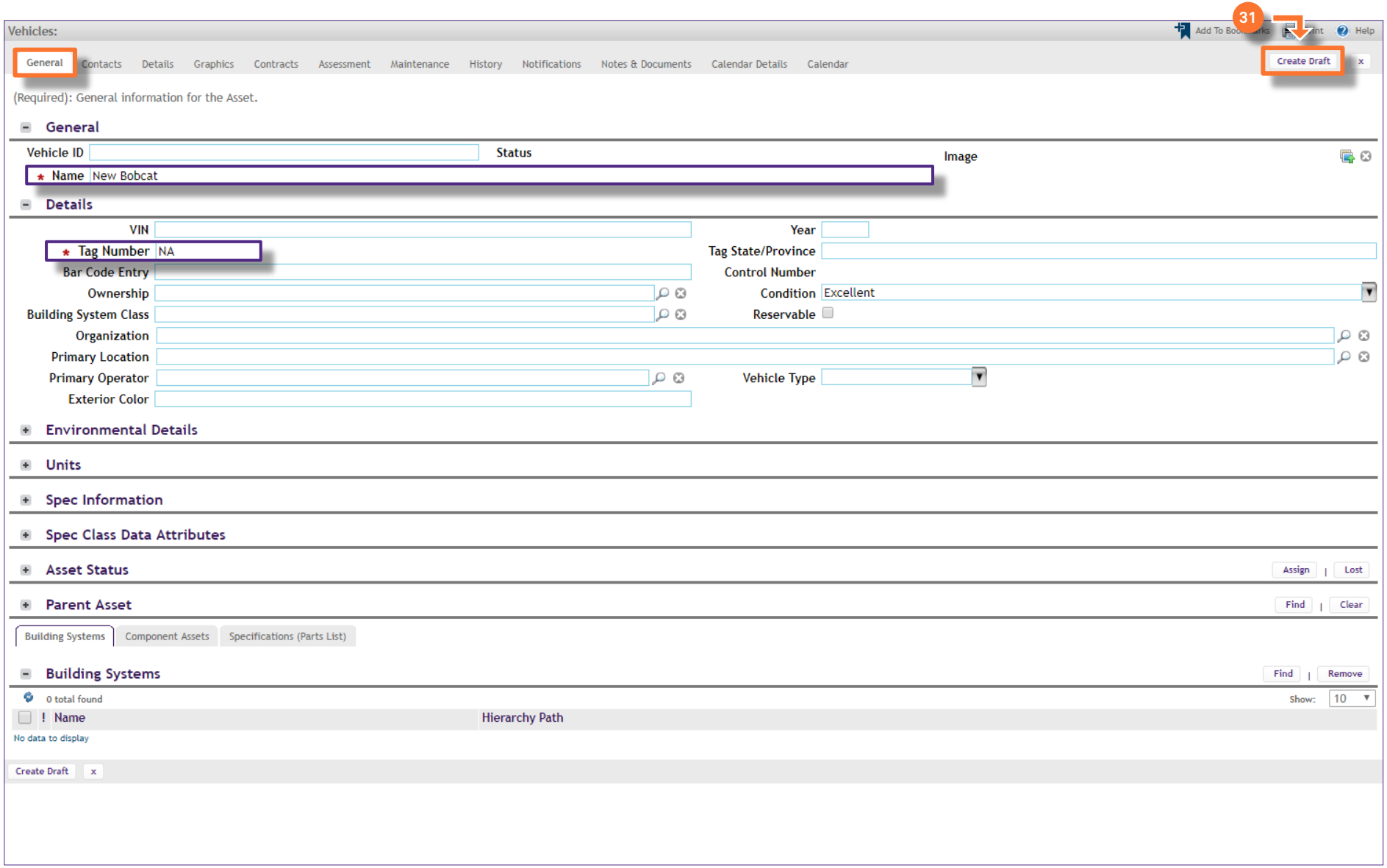
Create a New Asset

Once each of the two (2) required fields have been updated:

31) Create a draft of your new **Vehicles Asset**; click on the **Create Draft** button (upper right of the form)

*<<Upon clicking, the **Vehicles Asset** record is saved, and new action buttons will appear at the upper right of the form>>*

▶ INFORMATION



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▼ PROCESS

Process 2.3

Create a New Asset

The new **Vehicles Asset** has now been saved in Facilities Connect.

You may continue to navigate and update this asset using the record tabs located at the top of the screen.

32) As you complete modifications to the asset record, it's good practice to save your work by clicking on the **Save** button.

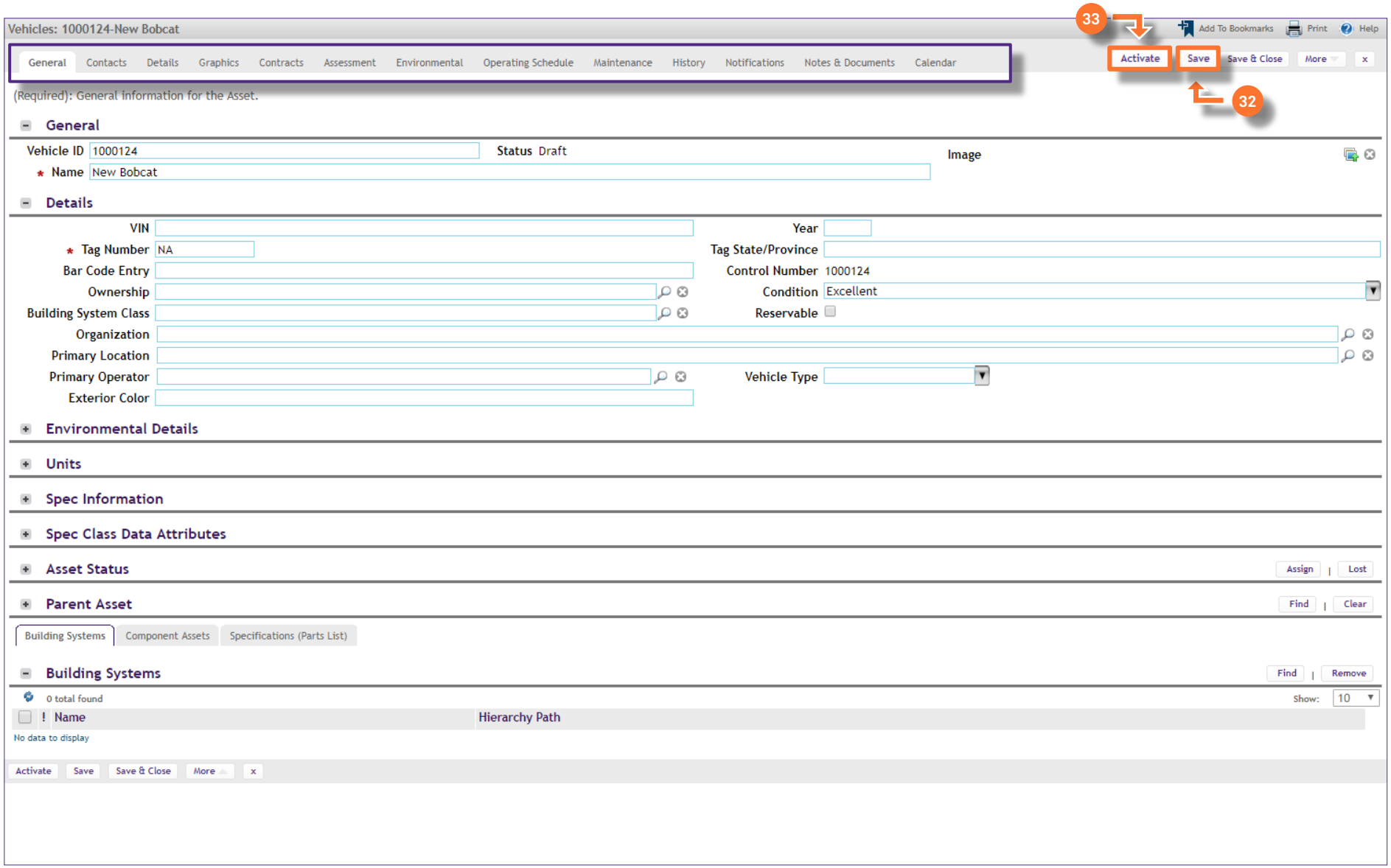
33) Once all modifications have been recorded, click the **Activate** button to save and exit.

Note: Asset records contain a large number of data fields, several of which may not be used by NU Facilities.

In the event of any questions or clarifications regarding usage of data fields, please consult the appropriate NU Facilities – Operations leader.

End of Process

▶ INFORMATION



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