Northwestern | FACILITIES CONNECT

OPERATIONS & MAINTENANCE



Preventive Maintenance

Add a New Asset



Add a New Asset

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for adding new building equipment assets in Facilities Connect.

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

VERSION INFORMATION (THIS DOCUMENT)

Version 1.1 Release Date 03/04/2022

Owner **NU Facilities**

Version This is the original version of the document; content within represents delivered system functionality at Building Equipment Assets go-live

(2/5/2019), and has been verified as up-to-date of this document's

release (07/01/2021)

REVISION HISTORY

Most Recent →

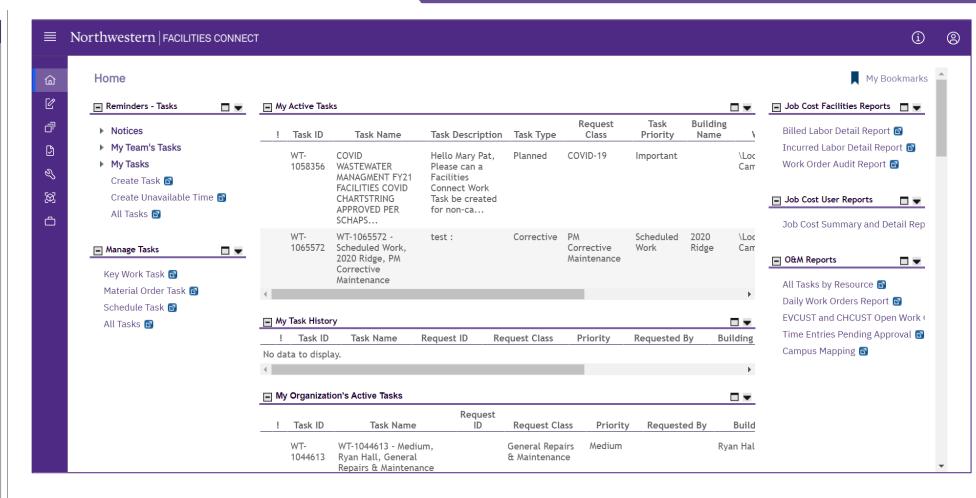
Version	Release Date	Action	Owner	
1.1	03/04/2022	Updated	NU Facilities	
1.0	07/01/2021	1 Created NU Facilities		



NOW VIEWING HOME SCREEN

▼ GETTING STARTED

- To begin, access the Facilities Connect Home Screen
- In order to create Building Equipment Assets as outlined in this job guide, the user <u>must</u>:
 - a) Possess the **Asset Manager** role and responsibilities



▶ PROCESS



IMPORTANT

- Before proceeding to the processes outlined within this document, it is important to understand the distinction between a Building 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.

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?

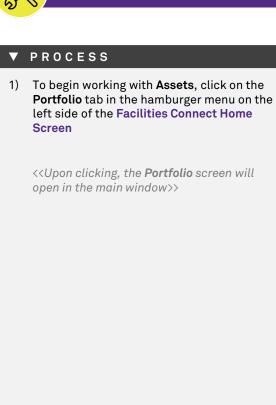
- Serial number, NU Asset Tag Barcode, and Campus Location Information
- Unit Condition and In/Out of Service Dates
- Associated Specification
- Preventive Maintenance Schedule
- Operating Schedule
- Operational History / Move, Downtime Information
- Item Cost Information
- Parts List

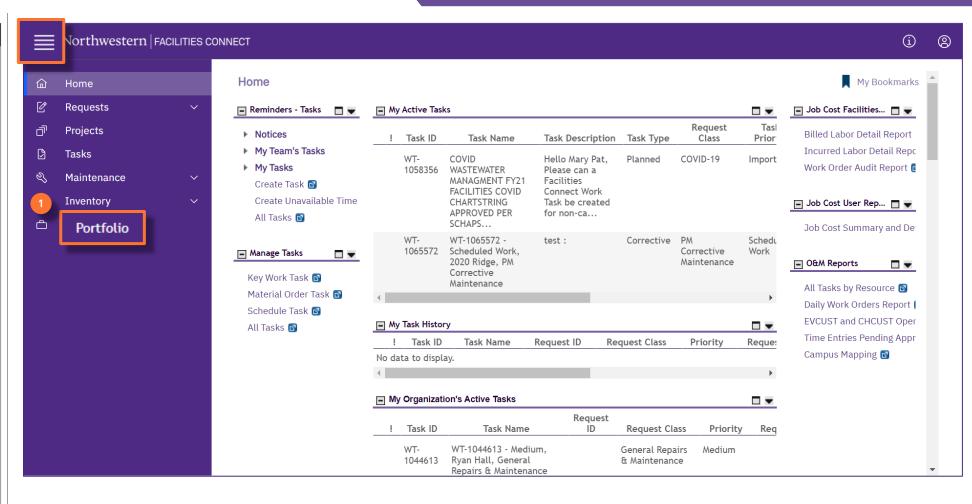
PROCESS



NOW VIEWING

HOME SCREEN

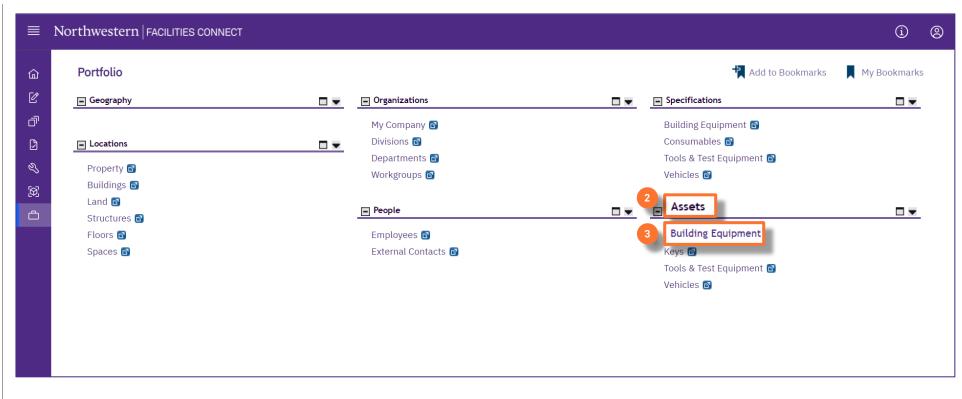






NOW VIEWING PORTFOLIO SCREEN

▼ PROCESS 2) Locate the Assets Section. 3) Click on the **Building Equipment** option. <<Upon clicking, the **Building Equipment** screen will open in the main window>>

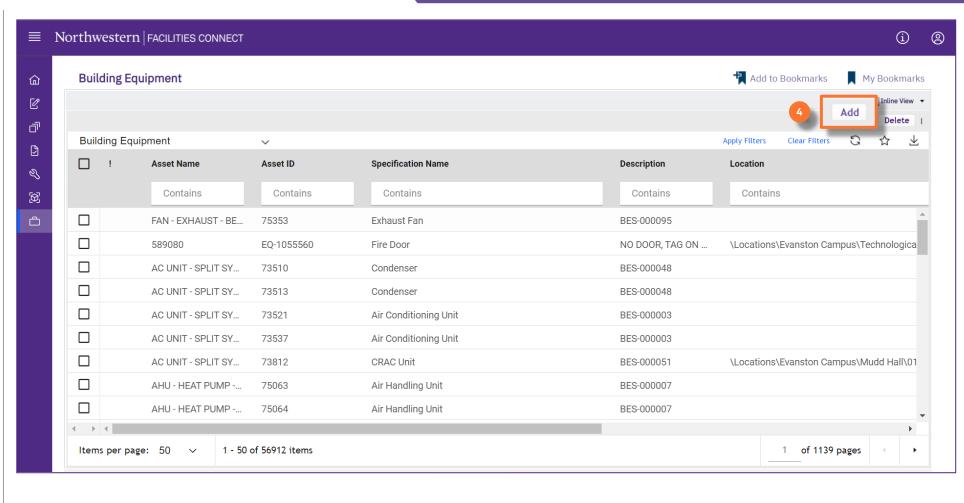




NOW VIEWING

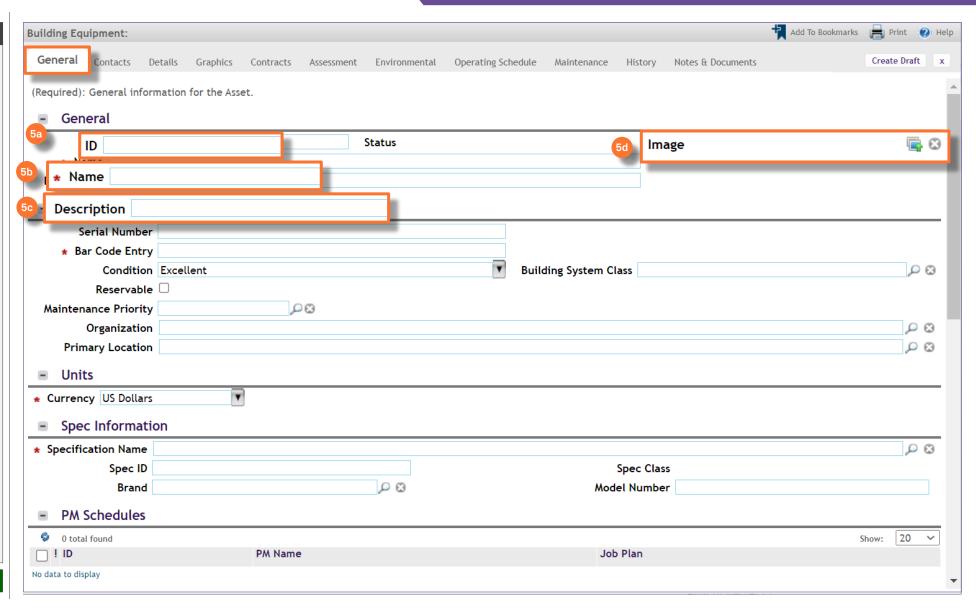
BUILDING EQUIPMENT SCREEN

▼ PROCESS 4) Click on the Add button. <<Upon clicking, a new **Building Equipment** Asset Record screen will open in a new window>>





▼ PROCESS To complete the Asset Record, provide the following information: Start on the General tab. 5) General section: a) ID - Asset Bar Code. b) Name - the name of the asset AND a separate tag number other than ID if it exists. c) Description – location and what the asset does. Image – upload any images from your computer if available using the upload icon.



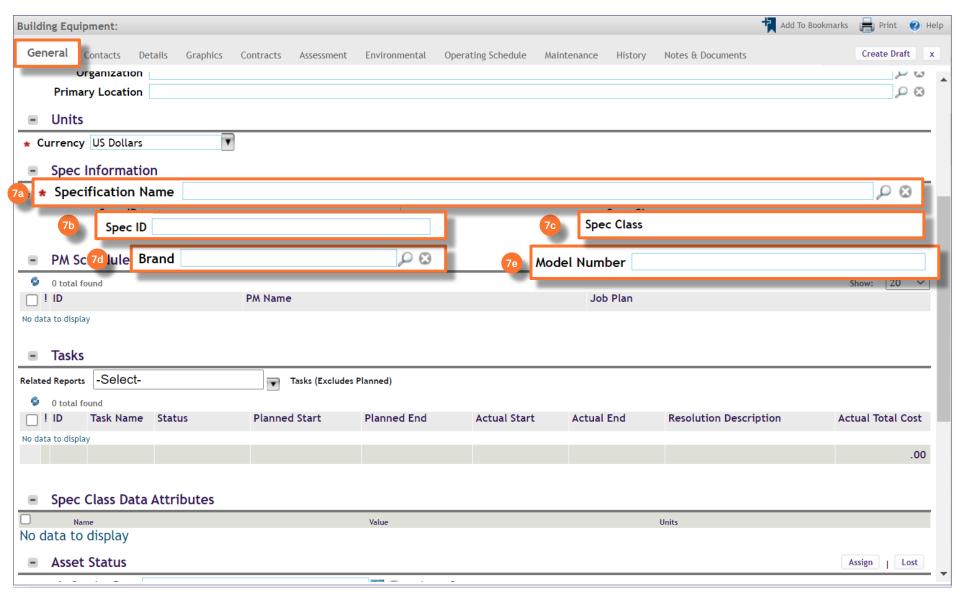


▼ PROCESS 6) Details section: a) Serial Number - Stamped VIN number or manufacture number. Not the Asset ID/Bar Code b) Bar Code Entry – Asset Bar Code. c) Maintenance Priority – use the search icon (magnifying glass) to select from the priority menu. d) Primary Location – use the search icon to search for the location of the asset. ► INFORMATION

Building Equipment:				Add To Bookn	narks <mark> Pri</mark> nt 🕐 Help
General Contacts Detail	ils Graphics Contracts Assessmen	nt Environmental Operating S	chedule Maintenance History	Notes & Documents	Create Draft x
(Required): General informat	tion for the Asset.				
- General					
ID		Status		mage	
* Name				·	
Description					
Details					
6a Serial Number					
Bar Code Entry	,		D 11 11 15 1 21		
* Dai Code Entry			Building System Class		₽ 🕄
Maintenance Priori		D 83			
Organization					ی م
Primary Location					<i>₽</i> 8
- Units					
* Currency US Dollars	¥				
Spec Information					
* Specification Name					ی م
Spec ID			Spec Cla	ss	
Brand		P 8	Model Number	er	
■ PM Schedules					
0 total found					Show: 20 V
□ ! ID	PM Name		Job Plan		
No data to display					



▼ PROCESS 7) Spec Information section: a) Specification Name - type or search for the Asset Specification. b) Spec ID - will autofill based on the specification type. c) Spec Class - will autofill based on the specification type. d) Brand - use the search icon to search Brand name. Model Number – stamped onto asset.



Create Draft x

J 63

₽ 🖸

₽ 🕄

Actual Total Cost

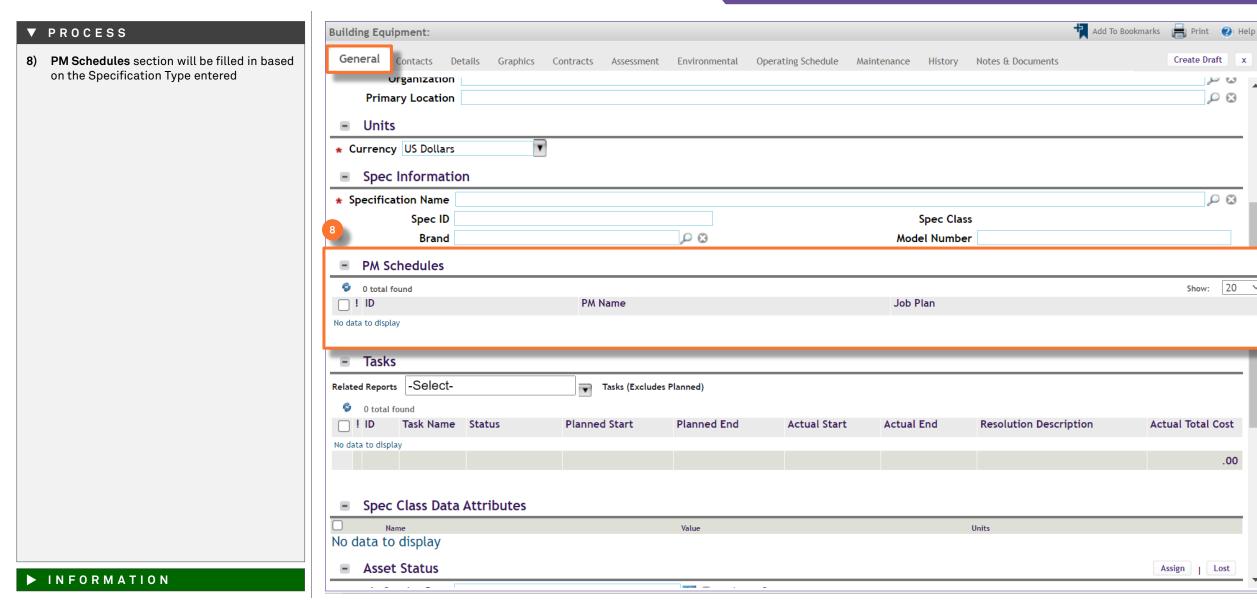
Assign Lost

20 ~

.00



ASSET RECORD SCREEN NOW VIEWING



Page 11 of 19 Version 1.1 © 2022 Northwestern University



▼ PROCESS 9) Parent Asset – complete this section only if the information exists. a) Click on the **Find** button to search for the appropriate Parent Asset. 10) Component Asset – complete this section only if the information exists. a) Click on the **Find** button to search for the appropriate Component Asset.

Building Equipment:				+ Add To	Bookmarks 📕 Print 😰 Help
				^	
	Contracts Assessment E	Environmental Operating Schedule	Maintenance History	Notes & Documents	Create Draft x
0 total found ID Task Name Status	Planned Start P	Planned End Actual Start	Actual End	Resolution Description	Actual Total Cost
No data to display	Flaimed Start F	Actual Start	Actual Ella	Resolution Description	Actual local cost
NO data to display					.00
Spec Class Data Attributes					
Name		Value		Units	
No data to display					
- Asset Status					Assign Lost
In Service Date		Asset Status			
Ownership Status					
Warranty Status					
Out Of Service Date	25				
Parent Asset					9 Find Clear
ID					-
Name					
Building Systems Component Assets peci	fications (Parts List)				
Component Assets	(* 11 12 11 17)				
 Component Assets 					10 Find Remove
0 total found					Show: 10 V
! Status Color	ID	Asset Name		Status	
No data to display					
Create Draft x					



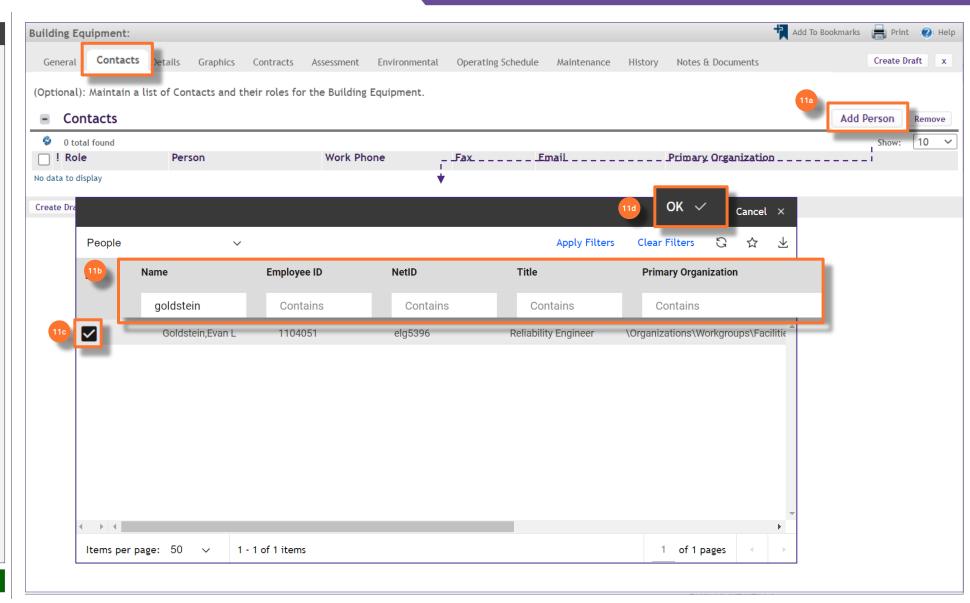
▼ PROCESS

Move to the Contacts tab.

- 11) Contacts add any important contacts, such as the main Supervisor for the department where the asset is located
 - a) Click on the Add Person button.

<<Upon clicking, the Add Person subwindow will open in the Asset Record >>

- Use the Name or Primary
 Organization fields to search for your contacts.
- c) Click the **checkbox** next to the Contact you want to add.
- d) Click **OK** to save the contact.



V

Add To Bookmarks 🗐 Print 🕖 Help

Create Draft x

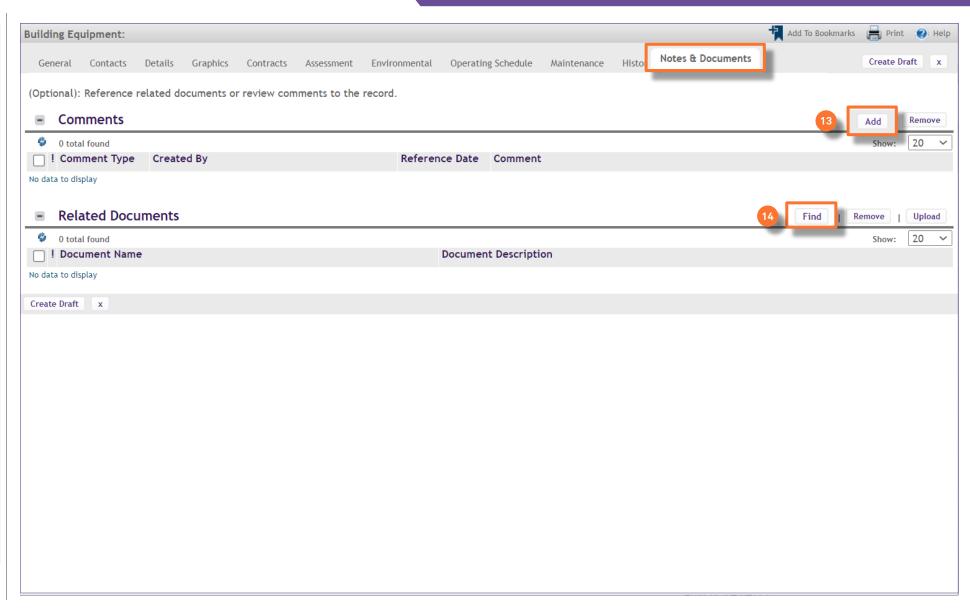


NOW VIEWING ASSET RECORD SCREEN

▼ PROCESS **Building Equipment:** Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notes & Documents Move to the **Details** tab. General 12) Add any important information regarding (Optional): Details for Building Equipment. the physical details of the Asset. Units Energy Unit joules Length Units feet Dimensions 0 feet 0 feet Depth Width 0 feet 0 pounds-mass Weight Height Details Capacity Belt Voltage Amps Refrigerant **RPM** Filter Size Charge HP **GPM** FT/HD State ID KVA Frame KW BtuH SEER Annual Fuel Utilization Efficiency Create Draft x ► INFORMATION

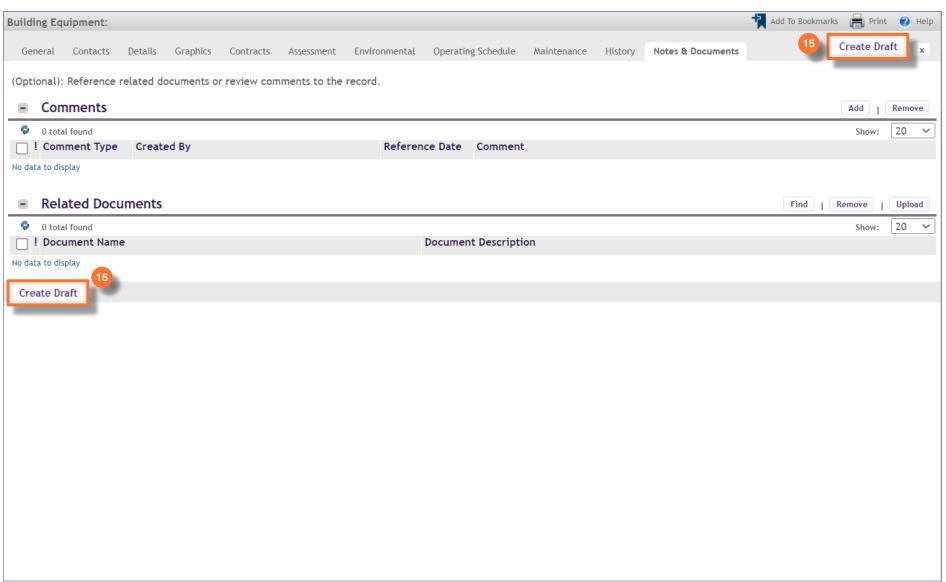


▼ PROCESS Move to the Notes & Documents tab. 13) Comments – option to add any important information regarding Asset's history, location, or status. Click the **Add** button to add a new comment. 14) Related Documents – option to add any photos or documents related to the Asset, such as Click the Add button to add a new file.











▼ PROCESS
Once the Draft has been created,
 Click on the Activate button to complete the New Asset.
<pre><<upon and="" asset="" clicking,="" close="" portfolio="" return="" screen="" the="" to="" will="" window="" you="">></upon></pre>
► INFORMATION

Building Equipment: 12	3456-Air Handler	998877				Add To Bookmarks 🔓 Print 🕡 Help
General Contacts	Details Grap	hics Contracts	Assessment Environmental	Operating Schedule Maintenance	Hist ×	tivate Save & Close More x
(Required): General info	ormation for the A	sset.			_	_
- General						
ID 123456			Status Draft		Image	- ⊗
* Name Air Han						
Description BES-00	0007					
Details						
Serial Numbe	r					
* Bar Code Entr	y 123456					
Conditio	n Excellent			Building System Clas	s	<i>P</i> ⊗
Reservabl	e 🗆			_		
Maintenance Priorit	у	PB				
Organizatio	n					۵ م
Primary Locatio	n					ρ Θ
Units						
* Currency US Dollar	'S	Y				
		_				
Spec Informat						
 Specification Name 		nit				₽ 🛭
· · · · · · · · · · · · · · · · · · ·	BES-000007			•		DN, AND AIR CONDITIONING (HVAC)
Brand			D 03	Model Number	-	
PM Schedules						
0 total found						Show: 20 V
☐ ! ID		PM Name		Job P	lan	
No data to display						



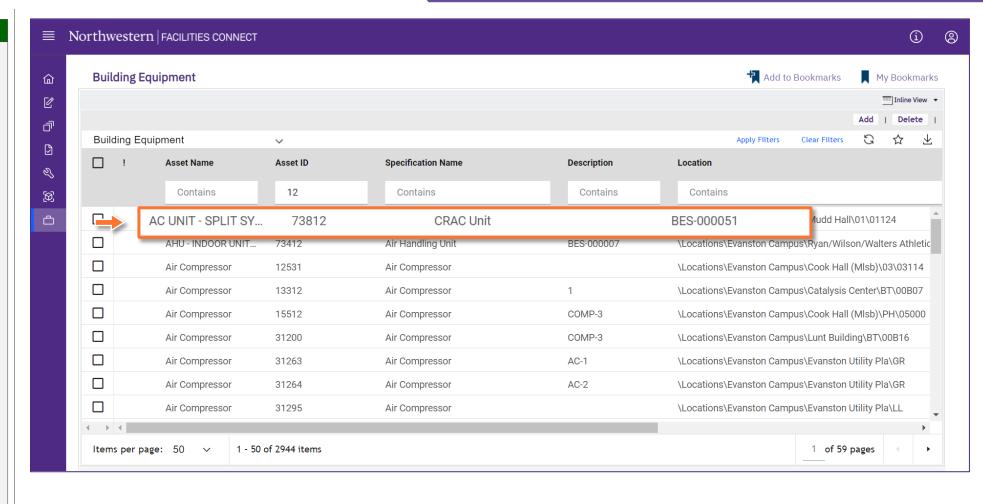
NOW VIEWING

PORTFOLIO SCREEN

► INFORMATION

To locate your new asset, enter keywords into the search fields.

Click on the Asset Name to open the Asset Record.



▼ PROCESS