



Job Guide #1

# Managing Assets: Building Equipment



## MANAGING ASSETS: BUILDING EQUIPMENT

### DOCUMENT SUMMARY

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This job guide provides step-by-step instruction for accessing, viewing, and managing 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)

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Version	<b>1.0</b>	Release Date	<b>4/24/2019</b>
Owner	<b>NU Facilities</b>		
Version Notes	<b>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 (4/24/19)</b>		

### REVISION HISTORY

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	Version	Release Date	Action	Owner
Most Recent →	1.0	4/24/2019	Created	NU Facilities
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▼ GETTING STARTED

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

▶ PROCESS

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home Maintenance Portfolio

Home

Personalize Open In New Window My Bookmarks

Reminders - Projects

- ▶ Notices
- ▶ Change Order and RFIs
- ▶ Proposals
- ▶ Purchase Orders
- ▶ Contracts
- ▶ Invoices and Payments
- ▶ Tasks

Related Links - Projects

- Document Manager
- ▶ Programs and Funding Sources
- ▶ Projects

Last Visited

My Projects - Phase 0.0 Initial Request

My Projects - Phase 1.0 Feasibility

My Projects - Phase 2.0 Design

My Projects - Phase 3.0 Construction Procurement

My Projects - Phase 4.0 Construction

My Projects - Phase 5.0 Operational

My Projects - Phase 6.0 Close-Out

Project Reports

- All Progress Reports
- Current Budget Balance (Summary by PM) Ref
- Current Budget Balance (Detail) Report - All F
- Project Area Summary
- Project Financial Summary
- Project Schedule Summary
- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager

Space Information

- Area by Space Class Parent
- Assignee Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant List
- Department Base Data Report
- Department Base Data v2
- Room and Department Base Data Only
- Office Area Capacity
- Overall Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping

**▼ 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**.

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



## ▼ 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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home Maintenance **Portfolio**

Home Personalize Open In New Window My Bookmarks

Reminders - Projects

- Notices
- Change Order and RFIs
- Proposals
- Purchase Orders
- Contracts
- Invoices and Payments
- Tasks

Related Links - Projects

- Document Manager
- Programs and Funding Sources
- Projects

Last Visited

My Projects - Phase 0.0 Initial Request

My Projects - Phase 1.0 Feasibility

My Projects - Phase 2.0 Design

My Projects - Phase 3.0 Construction Procurement

My Projects - Phase 4.0 Construction

My Projects - Phase 5.0 Operational

My Projects - Phase 6.0 Close-Out

Project Reports

- All Progress Reports
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- Project Contact List
- Scheduled Task Compliance
- Vendor Characteristics Query
- Workload by Primary Project Manager

Space Information

- Area by Space Class Parent
- Assignee Space Report
- Building Data
- Building Occupant Contact List
- Building Occupant List
- Department Base Data Report
- Department Base Data v2
- Room and Department Base Data Only
- Office Area Capacity
- Overall Total Campus Square Footage
- Space Allocation
- Space Class Count by Building
- Space Report by Building
- Campus Mapping

**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 **Building Equipment**, asset and specification information is accessible via the **Building Equipment** option, located on each menu.

- To begin, access **Building Equipment Specifications**, click on the option labeled **Building Equipment**, located within the **Specifications** menu

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

**INFORMATION**

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | **Portfolio**

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio

Personalize Open In New Window Add to Bookmarks My Bookmarks

**Geography**

- Geography Hierarchy
- World Regions
- Countries
- States
- Counties
- Cities

**Organizations**

- Organization Hierarchy
- My Company
- Divisions
- Departments
- External Companies
- Workgroups

**Locations**

- Property
- Buildings
- Land
- Structures
- Floors
- Spaces
- Vertical Shaft

**People**

- Employees
- Consultants
- External Contacts

**Specifications**

- Building Equipment**
- Consumables
- Cylinder
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles

**Assets**

- Building Equipment
- Cylinder
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles



## ▶ PROCESS

## ▼ INFORMATION

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

- Navigation Path  
**Home > Portfolio > Building Equipment**
- Related Report Selection  
**Building Equipment Specification**

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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports: -Select- Building Equipment Specification

1 / 6 Export 275 total found Apply Filters Clear Filters Show: 50

Image	Name	Spec ID	Spec Class	Brand	Model Number
	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Access Hatch	BES-000001	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Air Compressor	BES-000002	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Conditioning Unit	BES-000003	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Curtain Fan	BES-000004	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Dryer	BES-000005	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Filtration System	BES-000006	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Handling Unit	BES-000007	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Intake	BES-000008	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Supply Filter	BES-000009	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Tank	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Automatic Door	BES-000011	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Automatic Transfer Switch	BES-000012	ELECTRICAL		
<input type="checkbox"/>	Backflow Preventer	BES-000013	PLUMBING		
<input type="checkbox"/>	Battery Charger	BES-000014	ELECTRICAL		
<input type="checkbox"/>	Biohazard Exhaust Fan	BES-000015	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Biohazard Fume Hood	BES-000016	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Blower Fan	BES-000017	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler	BES-000018	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler Pump	BES-000019	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Booster Pump	BES-000020	PLUMBING		
<input type="checkbox"/>	Bottle Filling Station	BES-000021	PLUMBING		
<input type="checkbox"/>	Brain Mixing Valve	BES-000022	PLUMBING		
<input type="checkbox"/>	Break Tank	BES-000023	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Breaker	BES-000024	ELECTRICAL		
<input type="checkbox"/>	Breaker Panel	BES-000025	ELECTRICAL		



▶ PROCESS  
▼ INFORMATION

On the **Building Equipment Specification** screen, you are able to locate and access an existing building equipment specification, or create a new building equipment 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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Welcome, NU Wildcat | Sign Out | About

Company | Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports: Select Building Equipment Specification

1 / 6 Export 275 total found Apply Filters Clear Filters

Show: 50

Image	Name	Spec ID	Spec Class	Brand	Model Number
	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Access Hatch	BES-000001	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Air Compressor	BES-000002	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Conditioning Unit	BES-000003	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Curtain Fan	BES-000004	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Dryer	BES-000005	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Filtration System	BES-000006	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Handling Unit	BES-000007	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Intake	BES-000008	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Supply Filter	BES-000009	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Tank	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Automatic Door	BES-000011	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Automatic Transfer Switch	BES-000012	ELECTRICAL		
<input type="checkbox"/>	Backflow Preventer	BES-000013	PLUMBING		
<input type="checkbox"/>	Battery Charger	BES-000014	ELECTRICAL		
<input type="checkbox"/>	Biohazard Exhaust Fan	BES-000015	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Biohazard Fume Hood	BES-000016	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Blower Fan	BES-000017	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler	BES-000018	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler Pump	BES-000019	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Booster Pump	BES-000020	PLUMBING		
<input type="checkbox"/>	Bottle Filling Station	BES-000021	PLUMBING		
<input type="checkbox"/>	Brain Mixing Valve	BES-000022	PLUMBING		
<input type="checkbox"/>	Break Tank	BES-000023	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Breaker	BES-000024	ELECTRICAL		
<input type="checkbox"/>	Breaker Panel	BES-000025	ELECTRICAL		



## ▼ PROCESS

Process 1.1

**Locate an Existing Specification**

Following Step #2, on the **Building Equipment 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. “heat pump”) 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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports: -Select- Building Equipment Specification

Export 275 total found | Apply Filters | Clear Filters | Show: 50

Image	Name	Spec ID	Spec Class	Brand	Model Number
	Access Hatch	BES-000001	EXTERIOR VERTICAL ENCLOSURES		
	Air Compressor	BES-000002	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Conditioning Unit	BES-000003	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Curtain Fan	BES-000004	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Dryer	BES-000005	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Filtration System	BES-000006	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Handling Unit	BES-000007	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Intake	BES-000008	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Supply Filter	BES-000009	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Air Tank	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Automatic Door	BES-000011	EXTERIOR VERTICAL ENCLOSURES		
	Automatic Transfer Switch	BES-000012	ELECTRICAL		
	Backflow Preventer	BES-000013	PLUMBING		
	Battery Charger	BES-000014	ELECTRICAL		
	Biohazard Exhaust Fan	BES-000015	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Biohazard Fume Hood	BES-000016	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Blower Fan	BES-000017	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Boiler	BES-000018	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Boiler Pump	BES-000019	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Booster Pump	BES-000020	PLUMBING		
	Bottle Filling Station	BES-000021	PLUMBING		
	Brain Mixing Valve	BES-000022	PLUMBING		
	Break Tank	BES-000023	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
	Breaker	BES-000024	ELECTRICAL		
	Breaker Panel	BES-000025	ELECTRICAL		



▼ PROCESS

Process 1.1

**Locate an Existing Specification**

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

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

▶ INFORMATION

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports:  Building Equipment Specification

Export | 1 total found | Apply Filters | Clear Filters | Show: 50

	Name	Spec ID	Spec Class	Brand	Model Number
<input type="checkbox"/>	Heat Pump	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Heat Pump	BES-000141	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		



NOW VIEWING BUILDING EQUIPMENT SPECIFICATION RECORD

**PROCESS**

Process 1.1  
**Locate an Existing Specification**

The **Building Equipment Specification** record, for Heat Pump 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**

Building Equipment Spec: Heat Pump-BES-000141

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-000141 Status Active Image

\* Name Heat Pump

Description BES-000141

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory  Contains Haz Mat

Self Service Request  Move Item

**Environmental Details**

Energy Rating Type Energy Rating Value 0

Overall Product Rating

**Spec Class Data Attributes**

**Units**

**Manufacturer**

**Manufacturer Details**

Brand Model Name Model Number

Product Code Product Code Type

List Price \$5.00 US Dollars Purchase Units each

**Item Cost**

**Item Use Cost**

**Entitlements**

Revise More x



▶ PROCESS

▼ INFORMATION

Process 1.2  
**Review an Existing Specification**

Once you have accessed a **Building Equipment Specification** record, you can now 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.

Buildi Equipment Spec: Heat Pump-BES-000141
Add To Bookmarks Print Help

General
Details
Products
Inventory
Maintenance
Self Service
Notifications
Notes & Documents
Revise More x

(Required): General information for Building Equipment Spec.

**General**

ID	BES-000141	Status	Active		Image
* Name	Heat Pump				
Description	BES-000141				

**Details**

Spec Type	Hard Spec	Specification Order Type			
* Spec Class	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		Construction Class		
Spec Group			Building System Class		
Created by			* Service Class	Mechanical	
Manage as Inventory	<input type="checkbox"/>		Contains Haz Mat	<input type="checkbox"/>	
Self Service Request	<input type="checkbox"/>		Move Item	<input type="checkbox"/>	

**Environmental Details**

Energy Rating Type		Energy Rating Value			0
Overall Product Rating					

**Spec Class Data Attributes**

**Units**

**Manufacturer**

**Manufacturer Details**

Brand		Model Number			
Model Name			Product Code Type		
Product Code			Purchase Units	each	
List Price	\$5.00	US Dollars			

**Item Cost**

**Item Use Cost**

**Entitlements**

Revise More x



## ▶ 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.)

Building Equipment Spec: Heat Pump-BES-000141

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-000141 Status Active Image

\* Name Heat Pump

Description BES-000141

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory  Contains Haz Mat

Self Service Request  Move Item

**Environmental Details**

Energy Rating Type Energy Rating Value 0

Overall Product Rating

\* **Spec Class Data Attributes**

\* **Units**

\* **Manufacturer**

**Manufacturer Details**

Brand Model Number

Model Name Product Code Type

Product Code Purchase Units each

List Price \$5.00 US Dollars

\* **Item Cost**

\* **Item Use Cost**

\* **Entitlements**

Revise More x



▼ PROCESS

Process 1.2

**Review an Existing Specification**

To modify a **Building Equipment Specification** record, perform the following steps

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

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

▶ INFORMATION

Building Equipment Spec: Heat Pump-BES-000141

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-000141 Status Active Image

\* Name Heat Pump

Description BES-000141

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory  Contains Haz Mat

Self Service Request  Move Item

**Environmental Details**

Energy Rating Type Energy Rating Value 0

Overall Product Rating

**Spec Class Data Attributes**

**Units**

**Manufacturer**

**Manufacturer Details**

Brand Model Number

Model Name Product Code Type

Product Code Purchase Units each

List Price \$5.00 US Dollars

**Item Cost**

**Item Use Cost**

**Entitlements**

Revise More x





## ▼ 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

Building Equipment Spec: Heat Pump-BES-000141

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-000141 Status Revision In Progress Image

\* Name Heat Pump

Description BES-000141

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory Contains Haz Mat

Self Service Request Move Item

**Environmental Details**

Energy Rating Type Energy Rating Value 0

Overall Product Rating

**Spec Class Data Attributes**

**Units**

**Manufacturer** Find Clear

**Manufacturer Details**

Brand Model Number

Model Name Product Code Type

Product Code List Price Item Cost Item Use Entitlement Purchase Units Quantity each

RF IDEAS

RHEEM

RHEEM-RUUD

Rhino

RIB

RICHARD SPECIALTY

RICHELIEU

RIDGID

RIEKE

Activate Save Find Remove



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 **Building Equipment 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 a New Specification

INFORMATION

Building Equipment Spec: Heat Pump-BES-000141

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-000141 Status Revision In Progress Image

\* Name Heat Pump

Description BES-000141

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory Contains Haz Mat

Self Service Request Move Item

**Environmental Details**

Energy Rating Type Energy Rating Value 0

Overall Product Rating

**Spec Class Data Attributes**

**Units**

**Manufacturer** Find Clear

**Manufacturer Details**

Brand RHEEM-RUUD

**Model Name** Achiever Series Model Number

Product Code Product Code Type

List Price \$5.00 US Dollars Purchase Units Quantity each

**Item Cost**

**Item Use Cost**

**Entitlements** Find Remove

Activate Save Save & Close More x



▼ PROCESS

Process 1.3  
Create a New Specification

Following Step #2, on the **Building Equipment Specification** screen:

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

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

▶ INFORMATION

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window Add to Bookmarks My Bookmarks

11 Add Delete

Related Reports -Select- Building Equipment Specification

1 / 6 Export 275 total found Apply Filters Clear Filters Show: 50

Image	Name	Spec ID	Spec Class	Brand	Model Number
	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Access Hatch	BES-000001	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Air Compressor	BES-000002	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Conditioning Unit	BES-000003	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Curtain Fan	BES-000004	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Dryer	BES-000005	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Filtration System	BES-000006	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Handling Unit	BES-000007	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Intake	BES-000008	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Supply Filter	BES-000009	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Tank	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Automatic Door	BES-000011	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Automatic Transfer Switch	BES-000012	ELECTRICAL		
<input type="checkbox"/>	Backflow Preventer	BES-000013	PLUMBING		
<input type="checkbox"/>	Battery Charger	BES-000014	ELECTRICAL		
<input type="checkbox"/>	Biohazard Exhaust Fan	BES-000015	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Biohazard Fume Hood	BES-000016	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Blower Fan	BES-000017	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler	BES-000018	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler Pump	BES-000019	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Booster Pump	BES-000020	PLUMBING		
<input type="checkbox"/>	Bottle Filling Station	BES-000021	PLUMBING		
<input type="checkbox"/>	Brain Mixing Valve	BES-000022	PLUMBING		
<input type="checkbox"/>	Break Tank	BES-000023	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Breaker	BES-000024	ELECTRICAL		
<input type="checkbox"/>	Breaker Panel	BES-000025	ELECTRICAL		



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

The screenshot shows the 'Build Equipment Spec' form with the following fields and annotations:

- General Tab:**
  - Name:** Field 12, highlighted with an orange box and a magnifying glass icon.
  - Spec Class:** Field 13, highlighted with an orange box and a magnifying glass icon.
  - Service Class:** Field 14, highlighted with an orange box and a magnifying glass icon.
- Other Fields:** ID, Status, Image, Description, Spec Type (Hard Spec), Spec Group, Created by, Manage as Inventory, Self Service Request, Specification Number Type, Construction Class, Building System Class, Contains Haz Mat, Move Item.
- Expandable Sections:** Environmental Details, Spec Class Data Attributes, Units, Manufacturer, Manufacturer Details, Item Cost, Item Use Cost, Entitlements.
- Manufacturer Details:** Brand, Model Name, Product Code, List Price (\$ .00 US Dollars), Model Number, Product Code Type, Purchase Units (Quantity each).



▼ 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 **Building Equipment Specification**; click on the **Create Draft** button (upper right of the form)

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

▶ INFORMATION

Building Equipment Spec: Add To Bookmarks Print Help

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents Activate **Create Draft** x

(Required): General information for Building Equipment Spec.

**General**

ID  Status  Image

\* Name

Description

**Details**

Spec Type  Specification Order Type

\* Spec Class  Construction Class

Spec Group  Building System Class

Created by  \* Service Class

Manage as Inventory  Contains Haz Mat

Self Service Request  Move Item

**Environmental Details**

**Spec Class Data Attributes**

**Units**

**Manufacturer** Find | Clear

**Manufacturer Details**

Brand

Model Name  Model Number

Product Code  Product Code Type

List Price  US Dollars Purchase Units  each

**Item Cost**

**Item Use Cost**

**Entitlements** Find | Remove

Activate Create Draft x

15





PROCESS

Process 1.3

Create a New Specification

The new **Building Equipment 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 **Building Equipment 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

Building Equipment Spec: New Air Handler-BES-1000273

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Building Equipment Spec.

**General**

ID BES-1000273 Status Draft Image

\* Name New Air Handler

Description

**Details**

Spec Type Hard Spec Specification Order Type

\* Spec Class Air Handlers Construction Class

Spec Group Building System Class

Created by \* Service Class Mechanical

Manage as Inventory Contains Haz Mat

Self Service Request Move Item

**Environmental Details**

**Spec Class Data Attributes**

**Units**

**Manufacturer** Find Clear

**Manufacturer Details**

Brand Model Name Model Number

Product Code Product Code Type

List Price \$ .00 US Dollars Purchase Units Quantity each

**Item Cost**

**Item Use Cost**

**Entitlements** Find Remove

Activate Save Save & Close More x





## ▼ PROCESS

When working with **Building Equipment**, asset and specification information is accessible via the **Building Equipment** option, located on each menu.

18) To access assets, click on **Building Equipment** under the **Assets** menu.

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

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company | Project

Home | Maintenance | **Portfolio**

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio

Personalize | Open In New Window | Add to Bookmarks | My Bookmarks

**Geography**

- Geography Hierarchy
- World Regions
- Countries
- States
- Counties
- Cities

**Organizations**

- Organization Hierarchy
- My Company
- Divisions
- Departments
- External Companies
- Workgroups

**Specifications**

- Building Equipment
- Consumables
- Cylinder
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles

**Locations**

- Property
- Buildings
- Land
- Structures
- Floors
- Spaces
- Vertical Shaft

**People**

- Employees
- Consultants
- External Contacts

**Assets**

- Building Equipment**
- Cylinder
- Keys
- Key Rings
- Locks
- Tools & Test Equipment
- Vehicles



▶ PROCESS

▼ INFORMATION

On the **Building Equipment Asset** screen, you are able to locate and access an existing building equipment asset, or create a new building equipment 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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company | Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports:  Building Equipment

1 / 1088 | Export | 54379 total found | Apply Filters | Clear Filters

Show: 50

Asset Name	Asset ID	Specification Name	Description	Location	Organization	Status
Contains	Contains	Contains	Contains	Contains	Contains	Contains
Access Hatch	20055	Access Hatch		\\Locations\Evanston Campus\Technological Instit\03\1-300		Active
Access Hatch	30857	Access Hatch		\\Locations\Evanston Campus\Technological Instit\05\1-585		Active
Access Hatch	49167	Access Hatch		\\Locations\Evanston Campus\Scott Hall\04\00400B		Active
Access Hatch	49176	Access Hatch		\\Locations\Evanston Campus\Cahn Auditorium\BT\00010		Active
Access Hatch	49181	Access Hatch		\\Locations\Evanston Campus\Cahn Auditorium\01\00107		Active
Ada Entrance	71011			\\Locations\Evanston Campus\University Library\01		Active
Air Compressor	12531	Air Compressor		\\Locations\Evanston Campus\Cook Hall (Mlsb)\03\03114		Active
Air Compressor	13066	Air Compressor	COMP	\\Locations\Evanston Campus\2020_Ridge\01\00109		Active
Air Compressor	13101	Air Compressor	COMP-182	\\Locations\Evanston Campus\2020_Ridge\05		Active
Air Compressor	13189	Air Compressor	COMP-1	\\Locations\Evanston Campus\2020_Ridge\BT		Active
Air Compressor	13312	Air Compressor	1	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
Air Compressor	13313	Air Compressor	2	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
Air Compressor	13314	Air Compressor	4	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
Air Compressor	13315	Air Compressor	3	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
Air Compressor	13369	Air Compressor		\\Locations\Evanston Campus\Mccormick Foundation\01\01129		Active
Air Compressor	13451	Air Compressor	#1	\\Locations\Evanston Campus\Blomquist\01		Active
Air Compressor	13452	Air Compressor	#2	\\Locations\Evanston Campus\Blomquist\01		Active
Air Compressor	13458	Air Compressor		\\Locations\Evanston Campus\Patten Gym\BT\00B02		Active
Air Compressor	13484	Air Compressor	#1	\\Locations\Evanston Campus\2313_Sheridan\BT\00B10		Active
Air Compressor	13485	Air Compressor	#2	\\Locations\Evanston Campus\2313_Sheridan\BT\00B10		Active
Air Compressor	13505	Air Compressor	COMP	\\Locations\Evanston Campus\Bobb Hall\BT\00B03		Active
Air Compressor	13535	Air Compressor	COMP-2A	\\Locations\Evanston Campus\Ryan Field\01\00109		Active
Air Compressor	13536	Air Compressor	COMP-2B	\\Locations\Evanston Campus\Ryan Field\01\00109		Active
Air Compressor	13541	Air Compressor	COMP-1	\\Locations\Evanston Campus\Elder Hall\GR\00G59		Active
Air Compressor	13542	Air Compressor	COMP-2	\\Locations\Evanston Campus\Elder Hall\GR\00G61		Active



## ▼ PROCESS

Process 2.1

**Locate an Existing Asset**

Following Step #18, on the **Building Equipment 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

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window Add to Bookmarks My Bookmarks

Popup View

Add Delete

Related Reports  Building Equipment

1 / 1088 Export 54379 total found Apply Filters Clear Filters Show: 50

Asset Name	Asset ID	Specification Name	Description	Location	Organization	Status
<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>
<input type="checkbox"/> Access Hatch	20055	Access Hatch		\\Locations\Evanston Campus\Technological Instit\03\1-300		Active
<input type="checkbox"/> Access Hatch	30857	Access Hatch		\\Locations\Evanston Campus\Technological Instit\05\1-585		Active
<input type="checkbox"/> Access Hatch	49167	Access Hatch		\\Locations\Evanston Campus\Scott Hall\04\00400B		Active
<input type="checkbox"/> Access Hatch	49176	Access Hatch		\\Locations\Evanston Campus\Cahn Auditorium\BT\00010		Active
<input type="checkbox"/> Access Hatch	49181	Access Hatch		\\Locations\Evanston Campus\Cahn Auditorium\01\00107		Active
<input type="checkbox"/> Ada Entrance	71011			\\Locations\Evanston Campus\University Library\01		Active
<input type="checkbox"/> Air Compressor	12531	Air Compressor		\\Locations\Evanston Campus\Cook Hall (Msb)\03\03114		Active
<input type="checkbox"/> Air Compressor	13066	Air Compressor	COMP	\\Locations\Evanston Campus\2020_Ridge\01\00109		Active
<input type="checkbox"/> Air Compressor	13101	Air Compressor	COMP-182	\\Locations\Evanston Campus\2020_Ridge\05		Active
<input type="checkbox"/> Air Compressor	13189	Air Compressor	COMP-1	\\Locations\Evanston Campus\2020_Ridge\BT		Active
<input type="checkbox"/> Air Compressor	13312	Air Compressor	1	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
<input type="checkbox"/> Air Compressor	13313	Air Compressor	2	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
<input type="checkbox"/> Air Compressor	13314	Air Compressor	4	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
<input type="checkbox"/> Air Compressor	13315	Air Compressor	3	\\Locations\Evanston Campus\Catalysis Center\BT\00B07		Active
<input type="checkbox"/> Air Compressor	13369	Air Compressor		\\Locations\Evanston Campus\Mccormick Foundation\01\01129		Active
<input type="checkbox"/> Air Compressor	13451	Air Compressor	#1	\\Locations\Evanston Campus\Blomquist\01		Active
<input type="checkbox"/> Air Compressor	13452	Air Compressor	#2	\\Locations\Evanston Campus\Blomquist\01		Active
<input type="checkbox"/> Air Compressor	13458	Air Compressor		\\Locations\Evanston Campus\Patten Gym\BT\00B02		Active
<input type="checkbox"/> Air Compressor	13484	Air Compressor	#1	\\Locations\Evanston Campus\2313_Sheridan\BT\00B10		Active
<input type="checkbox"/> Air Compressor	13485	Air Compressor	#2	\\Locations\Evanston Campus\2313_Sheridan\BT\00B10		Active
<input type="checkbox"/> Air Compressor	13505	Air Compressor	COMP	\\Locations\Evanston Campus\Bobb Hall\BT\00B03		Active
<input type="checkbox"/> Air Compressor	13535	Air Compressor	COMP-2A	\\Locations\Evanston Campus\Ryan Field\01\00109		Active
<input type="checkbox"/> Air Compressor	13536	Air Compressor	COMP-2B	\\Locations\Evanston Campus\Ryan Field\01\00109		Active
<input type="checkbox"/> Air Compressor	13541	Air Compressor	COMP-1	\\Locations\Evanston Campus\Elder Hall\GR\00G59		Active
<input type="checkbox"/> Air Compressor	13542	Air Compressor	COMP-2	\\Locations\Evanston Campus\Elder Hall\GR\00G61		Active



▼ PROCESS

Process 2.1

Locate an Existing Asset

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

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

▶ INFORMATION

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window | Add to Bookmarks | My Bookmarks

Related Reports:  Building Equipment

1 / 3 | Export | 121 total found | Apply Filters | Clear Filters | Show: 50

Asset Name	Asset ID	Specification Name	Description	Location	Organization	Status
Heat	Contains	Contains	Contains	tech	Contains	Contains
Electric Unit Heater	21611	Electric Unit Heater		\\Locations\Evanston Campus\Technological Instit\GR\ST8-GR		Active
Electric Unit Heater	23078	Electric Unit Heater		\\Locations\Evanston Campus\Technological Instit\GR\ST11-GR		Active
Electric Unit Heater	30277	Electric Unit Heater		\\Locations\Evanston Campus\Technological Instit\05\M551		Active
Electric Water Heater	27216	Electric Water Heater		\\Locations\Evanston Campus\Technological Instit\03\A360		Active
Heat Exchanger	15920	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\03\B301		Active
Heat Exchanger	15930	Heat Exchanger	HX-1	\\Locations\Evanston Campus\Technological Instit\03\B301		Active
Heat Exchanger	27011	Heat Exchanger	BC5	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27012	Heat Exchanger	BC6	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27053	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\03\A360		Active
Heat Exchanger	27077	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\BT		Active
Heat Exchanger	27101	Heat Exchanger	BC3 100% GWS	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27102	Heat Exchanger	BC4 GWS STANDBY	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27177	Heat Exchanger	BC2	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27178	Heat Exchanger	BC1	\\Locations\Evanston Campus\Technological Instit\05\B501		Active
Heat Exchanger	27225	Heat Exchanger	CHWS	\\Locations\Evanston Campus\Technological Instit\03\A360		Active
Heat Exchanger	27282	Heat Exchanger	HX-1	\\Locations\Evanston Campus\Technological Instit\03\D301		Active
Heat Exchanger	27283	Heat Exchanger	HX-2B	\\Locations\Evanston Campus\Technological Instit\03\D301		Active
Heat Exchanger	27284	Heat Exchanger	HX-2A	\\Locations\Evanston Campus\Technological Instit\03\D301		Active
Heat Exchanger	27293	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\03\D301		Active
Heat Exchanger	27383	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\BT		Active
Heat Exchanger	27390	Heat Exchanger	FG5	\\Locations\Evanston Campus\Technological Instit\05\F501		Active
Heat Exchanger	27391	Heat Exchanger	FG6	\\Locations\Evanston Campus\Technological Instit\05\F501		Active
Heat Exchanger	27408	Heat Exchanger	FG4	\\Locations\Evanston Campus\Technological Instit\05\F501		Active
Heat Exchanger	27409	Heat Exchanger	FG3	\\Locations\Evanston Campus\Technological Instit\05\F501		Active
Heat Exchanger	27484	Heat Exchanger		\\Locations\Evanston Campus\Technological Instit\BT		Active

20





▼ PROCESS

Process 2.1  
**Locate an Existing Asset**

The **Building Equipment Asset** record, for Electric Water Heater 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

Building Equipment: 27216-Electric Water Heater
Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar
Revise More x

(Required): General information for the Asset.

**General**

ID 27216	Status Active	Image
<span style="border: 1px solid orange; padding: 2px;">* Name Electric Water Heater</span>		
Description		

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

Primary Location \Locations\Evanston Campus\Technological Instit\03\A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080	Spec Class PLUMBING
Brand	Model Number EGSP10

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018	Asset Status Available	<span style="background-color: green; color: white; padding: 2px 10px;"> </span>
Ownership Status		
Warranty Status		
Out Of Service Date		

**Parent Asset**

Building Systems Component Assets Specifications (Parts List)

**Building Systems**

Revise More x



▶ 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 **Building Equipment 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.

Build: Equipment: 27216-Electric Water Heater Add To Bookmarks Print Help

General
Contacts
Details
Graphics
Contracts
Assessment
Environmental
Operating Schedule
Maintenance
History
Notifications
Notes & Documents
Calendar
Revise More x

(Required): General information for the Asset.

---

**General**

ID 27216	Status Active	Image
* Name Electric Water Heater		
Description		

---

**Details**

Serial Number RR 1109610445	
* Bar Code Entry 27216	
Condition Good	Building System Class
Reservable <input type="checkbox"/>	
Maintenance Priority	
Organization	
Primary Location \Locations\Evanston Campus\Technological Instit\03\A360	

---

**Units**

---

**Spec Information**

* Specification Name Electric Water Heater	
Spec ID BES-000080	Spec Class PLUMBING
Brand	Model Number EGSP10

---

**Spec Class Data Attributes**

---

**Asset Status**

In Service Date 04/23/2018	Asset Status Available	<span style="background-color: green; width: 20px; height: 10px; display: inline-block;"></span>
Ownership Status		
Warranty Status		
Out Of Service Date		

---

**Parent Asset**

Building Systems
Component Assets
Specifications (Parts List)

---

**Building Systems**

Revise
More
x



## ▶ 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

Building Equipment: 27216-Electric Water Heater

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID 27216 Status Active Image

\* Name Electric Water Heater

Description

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

Primary Location \Locations\Evanston Campus\Technological Instit\03\--A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080 Spec Class PLUMBING

Brand Model Number EGSP10

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018 Asset Status Available

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset**

Building Systems Component Assets Specifications (Parts List)

**Building Systems**

Revise More x



▶ 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

Building Equipment: 27216-Electric Water Heater

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID 27216 Status Active Image

\* Name Electric Water Heater

Description

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

Primary Location \Locations\Evanston Campus\Technological Instit\03\A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080 Spec Class PLUMBING

Brand Model Number EGSP10

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018 Asset Status Available

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset**

Building Systems Component Assets Specifications (Parts List)

**Building Systems**

Revise More x



▼ PROCESS

Process 2.2

**Review an Existing Asset**

To modify a **Building Equipment Asset** record, perform the following steps

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

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

▶ INFORMATION

Building Equipment: 27216-Electric Water Heater

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID 27216 Status Active Image

\* Name Electric Water Heater

Description

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

Primary Location \Locations\Evanston Campus\Technological Instit\03\A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080 Spec Class PLUMBING

Brand Model Number EGSP10

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018 Asset Status Available

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset**

Building Systems Component Assets Specifications (Parts List)

**Building Systems**

Revise More x





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

Building Equipment: 27216-Electric Water Heater

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID 27216 Status Revision In Progress Image

\* Name Electric Water Heater

Description

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

**Primary Location** \Locations\Evanston Campus\Technological Instit\03--A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080

Brand

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset**

Building Systems Component Assets Specifications (P

**Building Systems**

Activate Save Save & Close More x

**Search Window**

1 / 6 Export 60 total found Apply Filters Clear Filters Show: 10

Building	Floor	ID	Name
Technological Instit	03	Contains	A
Technological Instit	03	8735-03--A302	-A302
Technological Instit	03	8735-03--A302A	-A302A
Technological Instit	03	8735-03--A308	-A308
Technological Instit	03	8735-03--A309	-A309
Technological Instit	03	8735-03--A310	-A310
Technological Instit	03	8735-03--A311	-A311
Technological Instit	03	8735-03--A312	-A312
Technological Instit	03	8735-03--A314	-A314
Technological Instit	03	8735-03--A315	-A315
Technological Instit	03	8735-03--A316	-A316



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 **Building Equipment 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

Building Equipment: 27216-Electric Water Heater

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID 27216 Status Revision In Progress Image

\* Name Electric Water Heater

Description

**Details**

Serial Number RR 1109610445

\* Bar Code Entry 27216

Condition Good Building System Class

Reservable

Maintenance Priority

Organization

Primary Location \Locations\Evanston Campus\Technological Instit\03\ -A360

**Units**

**Spec Information**

\* Specification Name Electric Water Heater

Spec ID BES-000080

Brand

**Spec Class Data Attributes**

**Asset Status**

In Service Date 04/23/2018

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset**

Building Systems Component Assets Specifications (Parent)

**Building Systems**

Activate Save Save & Close More x

26 Activate Save Save & Close More x

25

24

OK Export Cancel

Building	Floor	ID	Name
Technological Instit	03	Contains	A
Technological Instit	03	8735-03--A302	-A302
Technological Instit	03	8735-03--A302A	-A302A
Technological Instit	03	8735-03--A308	-A308
Technological Instit	03	8735-03--A309	-A309
Technological Instit	03	8735-03--A310	-A310
Technological Instit	03	8735-03--A311	-A311
Technological Instit	03	8735-03--A312	-A312
Technological Instit	03	8735-03--A314	-A314
Technological Instit	03	8735-03--A315	-A315
Technological Instit	03	8735-03--A316	-A316



PROCESS

Process 2.3

Create a New Asset

Following Step #18, on the Building Equipment Asset screen:

27) Click the Add button to open a new Building Equipment Asset record form

<<Upon clicking, a blank Building Equipment Asset record will open in a new window>>

INFORMATION

Northwestern | FACILITIES CONNECT

Welcome, NU Wildcat | Sign Out | About

Company Project

Home | Maintenance | Portfolio

Locations | Organizations | People | Assets | Portfolio Set Up

Home > Portfolio > Building Equipment

Open In New Window Add to Bookmarks My Bookmarks

27 Add Delete

Related Reports -Select- Building Equipment Specification

1 / 6 Export 275 total found Apply Filters Clear Filters Show: 50

Image	Name	Spec ID	Spec Class	Brand	Model Number
	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	Access Hatch	BES-000001	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Air Compressor	BES-000002	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Conditioning Unit	BES-000003	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Curtain Fan	BES-000004	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Dryer	BES-000005	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Filtration System	BES-000006	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Handling Unit	BES-000007	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Intake	BES-000008	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Supply Filter	BES-000009	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Air Tank	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Automatic Door	BES-000011	EXTERIOR VERTICAL ENCLOSURES		
<input type="checkbox"/>	Automatic Transfer Switch	BES-000012	ELECTRICAL		
<input type="checkbox"/>	Backflow Preventer	BES-000013	PLUMBING		
<input type="checkbox"/>	Battery Charger	BES-000014	ELECTRICAL		
<input type="checkbox"/>	Biohazard Exhaust Fan	BES-000015	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Biohazard Fume Hood	BES-000016	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Blower Fan	BES-000017	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler	BES-000018	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Boiler Pump	BES-000019	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Booster Pump	BES-000020	PLUMBING		
<input type="checkbox"/>	Bottle Filling Station	BES-000021	PLUMBING		
<input type="checkbox"/>	Brain Mixing Valve	BES-000022	PLUMBING		
<input type="checkbox"/>	Break Tank	BES-000023	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		
<input type="checkbox"/>	Breaker	BES-000024	ELECTRICAL		
<input type="checkbox"/>	Breaker Panel	BES-000025	ELECTRICAL		



PROCESS

Process 2.3

Create a New Asset

Beginning on the **General** tab, there are three (3) required fields which must be updated in order to save the new asset record. These fields are **Name**, **Bar Code Entry**, and **Specification Name**.

- 28) First, add a name for the new asset; type the name directly into the **Name** field.
- 29) Next, add the new asset's bar code number in the **Bar Code Entry** field; locate and type the number from the bar-coded asset tag in this field (e.g. 56185)
- 30) Next, associate a specification with the new asset in the **Specification Name** field; click on the **Magnifying Glass** (immediately to the right of the field) and select the appropriate **Specification**.

**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

Build\* Equipment:

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

28 - General

ID Status Image

\* Name

Description

29 - Details

Serial Number

\* Bar Code Entry

Condition Excellent Building System Class

Reservable

Maintenance Priority

Organization

Primary Location

30 Units

Spec Information

\* Specification Name

Spec ID Spec Class

Brand Model Number

Spec Class Data Attributes

Asset Status

In Service Date Asset Status

Ownership Status

Warranty Status

Out Of Service Date

Parent Asset

Building Systems Component Assets Specifications (Parts List)

Building Systems

Create Draft x



PROCESS

Process 2.3  
Create a New Asset

As you update each of the three (3) required fields, you will notice the following fields will auto-populate with additional information:

- ID
- Description
- Spec ID

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

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

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

INFORMATION

Building Equipment:

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID EQ-1054705 Status Image

\* Name New VAV Box Asset

Description BES-000263

**Details**

Serial Number

\* Bar Code Entry 99999

Condition Excellent Building System Class

Reservable

Maintenance Priority

Organization

Primary Location

**Units**

**Spec Information**

\* Specification Name VAV Box Spec Class

Spec ID BES-000263 Model Number

Brand

**Spec Class Data Attributes**

**Asset Status** Assign Lost

In Service Date Asset Status

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset** Find Clear

Building Systems Component Assets Specifications (Parts List)

**Building Systems** Find Remove

Create Draft x

31 Create Draft x

**Note:** The fields in the orange boxes will be auto-populated following entries to the three (3) required fields (purple boxes); these fields (orange) should not be manually entered or modified.



PROCESS

Process 2.3

Create a New Asset

The new **Building Equipment 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

Building Equipment: EQ-1054705-New VAV Box Asset

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notifications Notes & Documents Calendar

(Required): General information for the Asset.

**General**

ID EQ-1054705 Status Draft Image

\* Name New VAV Box Asset

Description BES-000263

**Details**

Serial Number

\* Bar Code Entry 99999

Condition Excellent Building System Class

Reservable

Maintenance Priority

Organization

Primary Location

**Units**

**Spec Information**

\* Specification Name VAV Box

Spec ID BES-000263 Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)

Brand Model Number

**Spec Class Data Attributes**

**Asset Status** Assign Lost

In Service Date Asset Status Available

Ownership Status

Warranty Status

Out Of Service Date

**Parent Asset** Find Clear

Building Systems Component Assets Specifications (Parts List)

**Building Systems** Find Remove

Activate Save Save & Close More x

