



Asset Manager

MANAGING ASSETS: VEHICLES, TOOLS, AND TEST EQUIPMENT



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
	--	--	--	--
	--	--	--	--
	--	--	--	--



TABLE OF CONTENTS

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.

PROCESS #	TOPIC / PROCESS	PAGE
--	Introduction to Assets and Specifications	4
1.1	Locate an Existing Specification	10
1.2	Review an Existing Specification	13
1.3	Create a New Specification	18
2.1	Locate an Existing Asset	24
2.2	Review an Existing Asset	27
2.3	Create a New Asset	33



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**:
 - Possess the **Asset Manager** role and responsibilities

PROCESS

Northwestern | FACILITIES CONNECT

Home

Reminders - Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Priority	Building Name
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Important	\Loc Carr
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Scheduled Work	2020 Ridge \Loc Carr

My Task History

No data to display.

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Requested By	Build
WT-	WT-1044613 - Medium,		General Repairs	Medium		Ryan Hal

Job Cost Facilities Reports

- Billed Labor Detail Report
- Incurred Labor Detail Report
- Work Order Audit Report

Job Cost User Reports

- Job Cost Summary and Detail Rep

O&M Reports

- All Tasks by Resource
- Daily Work Orders Report
- EVCUST and CHCUST Open Work
- Time Entries Pending Approval
- Campus Mapping



▼ 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



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

Home

Reminders - Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Prior
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Import
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Schedu Work

My Task History

No data to display.

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Req
WT-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium	

Portfolio

My Bookmarks

- Job Cost Facilities...
- Billed Labor Detail Report
- Incurred Labor Detail Repc
- Work Order Audit Report
- Job Cost User Rep...
- Job Cost Summary and De
- O&M Reports
- All Tasks by Resource
- Daily Work Orders Report
- EVCUST and CHCUST Oper
- Time Entries Pending Appr
- 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 **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



▶ 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**.

Northwestern | FACILITIES CONNECT

Vehicles Add to Bookmarks My Bookmarks

Inline View Add Delete

Vehicles Apply Filters Clear Filters

<input type="checkbox"/>	Image	Name	ID	Spec Class	Brand	Model Number	Status
<input type="checkbox"/>		Aerial Lift	VEH-1000015	Aerial Lift			Active
<input type="checkbox"/>		Cargo Van	VEH-1000018	Cargo Van			Active
<input type="checkbox"/>		Electric Vehicle	VEH-1000009	Electric Vehicle			Active
<input type="checkbox"/>		Fork Lift	VEH-1000000	Fork Lift			Active
<input type="checkbox"/>		Lawn Equipment	VEH-1000002	Lawn Equipment			Active

Items per page: 50 1 - 19 of 19 items 1 of 1 pages



▶ 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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

Inline View

Add | Delete

Apply Filters Clear Filters

<input type="checkbox"/>	Image	Name	ID	Spec Class	Brand	Model Number	Status
<input type="checkbox"/>		Aerial Lift	VEH-1000015	Aerial Lift			Active
<input type="checkbox"/>		Cargo Van	VEH-1000018	Cargo Van			Active
<input type="checkbox"/>		Electric Vehicle	VEH-1000009	Electric Vehicle			Active
<input type="checkbox"/>		Fork Lift	VEH-1000000	Fork Lift			Active
<input type="checkbox"/>		Lawn Equipment	VEH-1000002	Lawn Equipment			Active

Items per page: 50 1 - 19 of 19 items 1 of 1 pages



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

Northwestern | FACILITIES CONNECT

Vehicles

3 Vehicles

Image	Name	ID	Spec Class	Brand	Model Number	Status
<input type="checkbox"/>	 Aerial Lift	VEH-1000015	Aerial Lift			Active
<input type="checkbox"/>	 Cargo Van	VEH-1000018	Cargo Van			Active
<input type="checkbox"/>	 Electric Vehicle	VEH-1000009	Electric Vehicle			Active
<input type="checkbox"/>	 Fork Lift	VEH-1000000	Fork Lift			Active
<input type="checkbox"/>	 Lawn Equipment	VEH-1000002	Lawn Equipment			Active

Items per page: 50 1 - 19 of 19 items 1 of 1 pages



▼ 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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

Popup View

Add Delete

Apply Filters Clear Filters

	Image	Name	ID	Spec Class	Brand	Model Number	Status
<input type="checkbox"/>		SKID	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>		Skid Steer	VEH-1000011	Skid Steer		Contains	Active

Items per page: 50 1 - 1 of 1 items 1 of 1 pages



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

Vehicle Spec: Skid Steer-VEH-1000011

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

Add To Bookmarks Print Help

Revise More x

(Required): General information for Vehicle Spec.

General

ID VEH-1000011 Status Active Image

* Name Skid Steer

Description

Details

Spec Type Hard Spec Specification Order Type
* Spec Class Skid Steer Construction Class
Spec Group Building System Class
Created by * Service Class Facilities
Manage as Inventory Contains Haz Mat
Self Service Request Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer

Manufacturer Details

Brand Model Name Model Number
Product Code Product Code Type
List Price \$.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 **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.

Vehicle Spec: Skid Steer-VEH-1000011

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Vehicle Spec.

General

ID VEH-1000011 Status Active Image

* Name Skid Steer

Description

Details

Spec Type Hard Spec Specification Order Type

* Spec Class Skid Steer Construction Class

Spec Group Building System Class

Created by * Service Class Facilities

Manage as Inventory Contains Haz Mat

Self Service Request Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer

Manufacturer Details

Brand Model Number

Model Name Product Code Type

Product Code Purchase Units each

List Price \$.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.)

Vehicle Spec: Skid Steer-VEH-1000011 Add To Bookmarks Print Help

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

(Required): General information for Vehicle Spec.

General

ID VEH-1000011	Status Active	Image
* Name Skid Steer		
Description		

Details

Spec Type Hard Spec	Specification Order Type
* Spec Class Skid Steer	Construction Class
Spec Group	Building System Class
Created by	* Service Class Facilities
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

Spec Class Data Attributes

Units

Manufacturer

Manufacturer Details

Brand	Model Number
Model Name	Product Code Type
Product Code	Purchase Units each
List Price \$.00 US Dollars	

Item Cost

Item Use Cost

Entitlements

Revise More x



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

Vehicle Spec: Skid Steer-VEH-1000011

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Vehicle Spec.

General

ID VEH-1000011 Status Active Image

* Name Skid Steer

Description

Details

Spec Type Hard Spec Specification Order Type

* Spec Class Skid Steer Construction Class

Spec Group Building System Class

Created by * Service Class Facilities

Manage as Inventory Contains Haz Mat

Self Service Request Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer

Manufacturer Details

Brand Model Name Model Number

Product Code Product Code Type

List Price \$.00 US Dollars Purchase Units each

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

Vehicle Spec: Skid Steer-VEH-1000011

General | Products | Inventory | Maintenance | Self Service | Notifications | Notes & Documents

(Required): General information for Vehicle Spec.

General

ID: VEH-1000011 | Status: Revision In Progress | Image

* Name: Skid Steer

Description

Details

Spec Type: Hard Spec | Specification Order Type

* Spec Class: Skid Steer | Construction Class

Spec Group | Building System Class

Created by | * Service Class: Facilities

Manage as Inventory | Contains Haz Mat

Self Service Request | Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer Find | Clear

Manufacturer Details

Brand [Search] (6)

Model Name

Product Code: Bobcat (7)

- Cemline
- CHAPCO
- CHAPIN
- CHARLES INDUSTRIES
- CHARLOTTE PIPE AND FOUNDRY
- CHEM SEARCH
- CHEMSORB
- CHEMTROL (NIBCO)

List Price

* Item Cost

* Item Use

* Entitlements

Model Number

Product Code Type

Purchase Units: Quantity | each

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 **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 a New Specification

INFORMATION

Vehicle Spec: Skid Steer-VEH-1000011

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Vehicle Spec.

General

ID VEH-1000011 Status Revision In Progress Image

* Name Skid Steer

Description

Details

Spec Type Hard Spec Specification Order Type

* Spec Class Skid Steer Construction Class

Spec Group Building System Class

Created by * Service Class Facilities

Manage as Inventory

Self Service Request

Contains Haz Mat

Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer Find Clear

Manufacturer Details

Brand Bobcat

Model Name Bobcat Earthforce S16 Skid-Steer Loader Model Number

Product Code Product Code Type

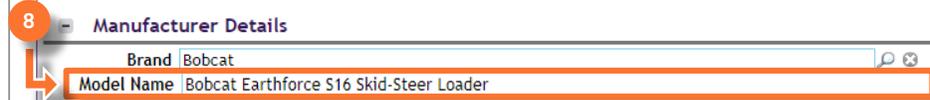
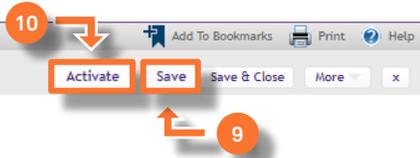
List Price \$.00 US Dollars Purchase Units Quantity each

Item Cost

Item Use Cost

Entitlements Find Remove

Activate Save Save & Close More x





▼ PROCESS

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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

11 Add Delete

Apply Filters Clear Filters

<input type="checkbox"/>	Image	Name	ID	Spec Class	Brand	Model Number	Status
<input type="checkbox"/>		Aerial Lift	VEH-1000015	Aerial Lift			Active
<input type="checkbox"/>		Cargo Van	VEH-1000018	Cargo Van			Active
<input type="checkbox"/>		Electric Vehicle	VEH-1000009	Electric Vehicle			Active
<input type="checkbox"/>		Fork Lift	VEH-1000000	Fork Lift			Active
<input type="checkbox"/>		Lawn Equipment	VEH-1000002	Lawn Equipment			Active

Items per page: 50 1 - 19 of 19 items 1 of 1 pages



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 'Vehicle Spec' form with the following fields and callouts:

- Callout 12:** Points to the **Name** field in the **General** section.
- Callout 13:** Points to the **Spec Class** field in the **Details** section.
- Callout 14:** Points to the **Service Class** field in the **Details** section.

The form includes sections for **General**, **Details**, **Environmental Details**, **Spec Class Data Attributes**, **Units**, **Manufacturer**, **Manufacturer Details**, **Item Cost**, **Item Use Cost**, and **Entitlements**.



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

Vehicle Spec: Add To Bookmarks Print Help

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

(Required): General information for Vehicle 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 **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

Vehicle Spec: New Skid Steer-VEH-1000019

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Vehicle Spec.

General

ID: VEH-1000019 Status: Draft Image

* Name: New Skid Steer

Description

Details

Spec Type: Hard Spec Specification Order Type

* Spec Class: Skid Steer Construction Class

Spec Group Building System Class

Created by * Service Class: Facilities

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 **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

Northwestern | FACILITIES CONNECT

Portfolio

- Geography
 - Locations
 - Property
 - Buildings
 - Land
 - Structures
 - Floors
 - Spaces
- Organizations
 - My Company
 - Divisions
 - Departments
 - Workgroups
- People
 - Employees
 - External Contacts
- Specifications
 - Assets
 - Building Equipment
 - Cylinder
 - Keys
 - Key Rings
 - Locks
 - Tools & Test Equipment
 - Vehicles
 - Building Equipment
 - Consumables
 - Tools & Test Equipment
 - Vehicles

Add to Bookmarks My Bookmarks

18

Tools & Test Equipment
Vehicles



▶ 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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

Inline View

Add | Delete

Apply Filters Clear Filters

<input type="checkbox"/>	Asset Name	Asset ID	Specification Name	Exterior Color	Year	Brand	Vehicle Type
<input type="checkbox"/>	743 Bobcat 743B - S...	Stadium		White		Bobcat	Skid Steer
<input type="checkbox"/>	Advance CS7000 - L...	Advance CS7000			2016	Advance	Other
<input type="checkbox"/>	Bobcat 5600 - Land...	#193		White	2011	Bobcat	Other
<input type="checkbox"/>	Bobcat 5600 - Land...	#209		White	2014	Bobcat	Other
<input type="checkbox"/>	Bobcat S130 - Land...	#183		White	2011	Bobcat	Other
<input type="checkbox"/>	Bobcat S650 - Land...	#187		White	2011	Bobcat	Other
<input type="checkbox"/>	Bobcat T450 - Land...	#207		White	2016	Bobcat	Tractor
<input type="checkbox"/>	Bobcat Toolcat - Ath...	Stadium		White	2016	Bobcat	Tractor
<input type="checkbox"/>	Chevrolet Colorado ...	#221		White	2016	Chevrolet	Truck

Items per page: 50 1 - 50 of 122 items 1 of 3 pages



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

Northwestern | FACILITIES CONNECT

Vehicles

19

Asset Name	Asset ID	Specification Name	Exterior Color	Year	
Contains	Contains	Contains	Contains	Contains	
<input type="checkbox"/>	Advance CS7000 - L...	Advance CS7000	2016	Advance	Other
<input type="checkbox"/>	Bobcat 5600 - Land...	#193	White	2011	Bobcat
<input type="checkbox"/>	Bobcat 5600 - Land...	#209	White	2014	Bobcat
<input type="checkbox"/>	Bobcat S130 - Land...	#183	White	2011	Bobcat
<input type="checkbox"/>	Bobcat S650 - Land...	#187	White	2011	Bobcat
<input type="checkbox"/>	Bobcat T450 - Land...	#207	White	2016	Bobcat
<input type="checkbox"/>	Bobcat Toolcat - Ath...	Stadium	White	2016	Bobcat
<input type="checkbox"/>	Chevrolet Colorado ...	#221	White	2016	Chevrolet

Items per page: 50 1 - 50 of 122 items 1 of 3 pages



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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

Popup View

Add Delete

Apply Filters Clear Filters

	Asset Name	Asset ID	Specification N...	Exterior C...	Year	Brand	Vehicle Type	Status
<input type="checkbox"/>	BOBCAT	Contain	Contains	Contain:	Cont	Contains	Contains	Contains
<input type="checkbox"/>	743 Bobcat 743B - Stadium	Stadium		White		Bobcat	Skid Steer	Active
<input type="checkbox"/>	Bobcat 5600 - Landscape Shop	#193		White	2011	Bobcat	Other	Active
<input type="checkbox"/>	Bobcat 5600 - Landscape Shop	#209		White	2014	Bobcat	Other	Active
<input type="checkbox"/>	Bobcat S130 - Landscape Shop	#183		White	2011	Bobcat	Other	Active
<input type="checkbox"/>	Bobcat S650 - Landscape Shop	#187		White	2011	Bobcat	Other	Active
<input type="checkbox"/>	Bobcat T450 - Landscape Shop	#207		White	2016	Bobcat	Tractor	Active
<input type="checkbox"/>	Bobcat Toolcat - Athletics	Stadium		White	2016	Bobcat	Tractor	Active

Items per page: 50 1 - 7 of 7 items 1 of 1 pages



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

Vehicles: 1000062-Bobcat Toolcat - Athletics

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

(Required): General information for the Asset.

General

Vehicle ID Stadium	Status Active	Image
* Name Bobcat Toolcat - Athletics		

Details

VIN AHG813045	Year 2016
* Tag Number NA	Tag State/Province
Bar Code Entry Stadium	Control Number 1000062
Ownership	Condition Good
Building System Class	Reservable <input type="checkbox"/>
Organization	Vehicle Type Tractor
Primary Location	
Primary Operator	
Exterior Color White	

Environmental Details

Units

Spec Information

Specification Name	Spec Class
Spec ID Tractor	Model Number Toolcat
Make Bobcat	
Description	

Spec Class Data Attributes

Asset Status

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 **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.

Vehicle: 1000062-Bobcat Toolcat - Athletics

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

(Required): General information for the Asset.

General

Vehicle ID Stadium	Status Active	Image
* Name Bobcat Toolcat - Athletics		

Details

VIN AHG813045	Year 2016
* Tag Number NA	Tag State/Province
Bar Code Entry Stadium	Control Number 1000062
Ownership	Condition Good
Building System Class	Reservable <input type="checkbox"/>
Organization	
Primary Location	Vehicle Type Tractor
Primary Operator	
Exterior Color White	

Environmental Details

Units

Spec Information

Specification Name	Spec Class
Spec ID Tractor	Model Number Toolcat
Make Bobcat	
Description	

Spec Class Data Attributes

Asset Status

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

Vehicles: 1000062-Bobcat Toolcat - Athletics

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

(Required): General information for the Asset.

General

Vehicle ID Stadium	Status Active	Image
* Name Bobcat Toolcat - Athletics		

Details

VIN AHG813045	Year 2016
* Tag Number NA	Tag State/Province
Bar Code Entry Stadium	Control Number 1000062
Ownership	Condition Good
Building System Class	Reservable <input type="checkbox"/>
Organization	
Primary Location	
Primary Operator	Vehicle Type Tractor
Exterior Color White	

Environmental Details

Units

Spec Information

Specification Name	Spec Class
Spec ID Tractor	Model Number Toolcat
Make Bobcat	
Description	

Spec Class Data Attributes

Asset Status

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

Vehicles: 1000062-Bobcat Toolcat - Athletics

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

(Required): General information for the Asset.

General

Vehicle ID Stadium	Status Active	Image
* Name Bobcat Toolcat - Athletics		

Details

VIN AHG813045	Year 2016
* Tag Number NA	Tag State/Province
Bar Code Entry Stadium	Control Number 1000062
Ownership	Condition Good
Building System Class	Reservable <input type="checkbox"/>
Organization	Vehicle Type Tractor
Primary Location	
Primary Operator	
Exterior Color White	

Environmental Details

Units

Spec Information

Specification Name	Spec Class
Spec ID Tractor	Model Number Toolcat
Make Bobcat	
Description	

Spec Class Data Attributes

Asset Status

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 **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

Vehicles: 1000062-Bobcat Toolcat - Athletics

21

Print Help

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

(Required): General information for the Asset.

General

Vehicle ID Stadium Status Active Image

* Name Bobcat Toolcat - Athletics

Details

VIN AHG813045 Year 2016

* Tag Number NA Tag State/Province

Bar Code Entry Stadium Control Number 1000062

Ownership Condition Good

Building System Class Organization Reservable

Primary Location Vehicle Type Tractor

Primary Operator

Exterior Color White

Environmental Details

Units

Spec Information

Specification Name Spec ID Tractor Spec Class

Make Bobcat Model Number Toolcat

Description

Spec Class Data Attributes

Asset Status

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

Vehicles: 1000062-Bobcat Toolcat - Athletics

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

(Required): General information for the Asset.

General

Vehicle ID Stadium Status Revision In Progress Image

* Name Bobcat Toolcat - Athletics

Details

VIN AHG813045 Year 2016

* Tag Number NA Tag State/Province

Bar Code Entry Stadium Control Number 1000062

Ownership Condition Good

Building System Class Reservable

Organization

Primary Location

Primary Operator Vehicle Type Tractor

Exterior Color White

Environmental Details

Units

Spec Information

Specification Name

Spec ID Tractor

Make Bobcat

Description

Spec Class Data Attributes

Asset Status

Parent Asset

Building Systems Component Assets Specifications (Pa

Building Systems

Activate Save Save & Close More x

22

23

Building	Floor	ID	Name
Ryan Field	Contains	Contains	Contains
Ryan Field	01	1810-01-00100	00100
Ryan Field	01	1810-01-00100A	00100A
Ryan Field	01	1810-01-00100B	00100B
Ryan Field	01	1810-01-00100C	00100C
Ryan Field	01	1810-01-00100D	00100D
Ryan Field	01	1810-01-00101	00101
Ryan Field	01	1810-01-00102	00102
Ryan Field	01	1810-01-00102A	00102A
Ryan Field	01	1810-01-00102B	00102B
Ryan Field	01	1810-01-00102D	00102D



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

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\Ryan Field\01\00100

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
Ryan Field	Contains	Contains	Contains
<input type="radio"/>	Ryan Field	01	1810-01-00100
<input type="radio"/>	Ryan Field	01	1810-01-00100A
<input type="radio"/>	Ryan Field	01	1810-01-00100B
<input type="radio"/>	Ryan Field	01	1810-01-00100C
<input type="radio"/>	Ryan Field	01	1810-01-00100D
<input type="radio"/>	Ryan Field	01	1810-01-00101
<input type="radio"/>	Ryan Field	01	1810-01-00102
<input type="radio"/>	Ryan Field	01	1810-01-00102A
<input type="radio"/>	Ryan Field	01	1810-01-00102B
<input type="radio"/>	Ryan Field	01	1810-01-00102D



PROCESS

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

Northwestern | FACILITIES CONNECT

Vehicles

Add to Bookmarks My Bookmarks

27 Add Delete

Apply Filters Clear Filters

<input type="checkbox"/>	!	Asset Name	Asset ID	Specification N...	Exterior C...	Year	Brand	Vehicle Type	Status
		BOBCAT	Contain	Contains	Contain:	Cont	Contains	Contains	Contains
<input type="checkbox"/>		743 Bobcat 743B - Stadium	Stadium		White		Bobcat	Skid Steer	Active
<input type="checkbox"/>		Bobcat 5600 - Landscape Shop	#193		White	2011	Bobcat	Other	Active
<input type="checkbox"/>		Bobcat 5600 - Landscape Shop	#209		White	2014	Bobcat	Other	Active
<input type="checkbox"/>		Bobcat S130 - Landscape Shop	#183		White	2011	Bobcat	Other	Active
<input type="checkbox"/>		Bobcat S650 - Landscape Shop	#187		White	2011	Bobcat	Other	Active
<input type="checkbox"/>		Bobcat T450 - Landscape Shop	#207		White	2016	Bobcat	Tractor	Active
<input type="checkbox"/>		Bobcat Toolcat - Athletics	Stadium		White	2016	Bobcat	Tractor	Active

Items per page: 50 1 - 7 of 7 items 1 of 1 pages



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

Vehicle

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

(Required): General information for the Asset.

28 - General

Vehicle ID Status Image

* Name

- Details

VIN Year

29 * Tag Number Tag State/Province

Bar Code Entry Control Number

Ownership Condition

Building System Class Reservable

Organization

Primary Location

Primary Operator Vehicle Type

Exterior Color

* Environmental Details

* Units

* Spec Information

* Spec Class Data Attributes

* Asset Status

* Parent Asset

Building Systems Component Assets Specifications (Parts List)

- Building Systems

0 total found Show: 10

! Name Hierarchy Path

No data to display

Create Draft



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

Vehicles: Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Maintenance History Notifications Notes & Documents Calendar Details Calendar **Create Draft** x

(Required): General information for the Asset.

General

Vehicle ID Status Image

* **Name**

Details

VIN Year

* **Tag Number** Tag State/Province

Bar Code Entry Control Number

Ownership Condition

Building System Class Reservable

Organization

Primary Location

Primary Operator Vehicle Type

Exterior Color

* **Environmental Details**

* **Units**

* **Spec Information**

* **Spec Class Data Attributes**

* **Asset Status** Assign | Lost

* **Parent Asset** Find | Clear

Building Systems Component Assets Specifications (Parts List)

Building Systems Find | Remove

0 total found Show: 10

<input type="checkbox"/>	Name	Hierarchy Path
No data to display		

Create Draft x

31



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

Vehicles: 1000124-New Bobcat

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

(Required): General information for the Asset.

General

Vehicle ID 1000124 Status Draft Image

* Name New Bobcat

Details

VIN Year

* Tag Number NA Tag State/Province

Bar Code Entry Control Number 1000124

Ownership Condition Excellent

Building System Class Reservable

Organization

Primary Location

Primary Operator Vehicle Type

Exterior Color

Environmental Details

Units

Spec Information

Spec Class Data Attributes

Asset Status Assign Lost

Parent Asset Find Clear

Building Systems Component Assets Specifications (Parts List)

Building Systems Find Remove

0 total found Show: 10

No data to display

Activate Save Save & Close More x

33 Activate Save Save & Close More x

32