



Preventive Maintenance

Add a New Asset

VERSION 1.1

UPDATED 03/04/2022



Add a New Asset

DOCUMENT SUMMARY

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

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

VERSION INFORMATION (THIS DOCUMENT)

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

Owner **NU Facilities**

Version Notes **This is the original version of the document; content within represents delivered system functionality at Building Equipment Assets go-live (2/5/2019), and has been verified as up-to-date of this document's release (07/01/2021)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	07/01/2021	Created	NU Facilities
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	--	--	--	--



GETTING STARTED

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

PROCESS

Northwestern | FACILITIES CONNECT
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Home

Reminders - Tasks

- ▶ Notices
- ▶ My Team's Tasks
- ▶ My Tasks
 - Create Task
 - Create Unavailable Time
 - All Tasks

Manage Tasks

- Key Work Task
- Material Order Task
- Schedule Task
- All 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-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium	Ryan Hal	

My Bookmarks

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 **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**.

▶ 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 in the hamburger menu on the left side of the **Facilities Connect Home Screen**

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

INFORMATION

☰ Northwestern | FACILITIES CONNECT ⓘ 👤

- 🏠 Home
- 📝 Requests
- 📁 Projects
- 📄 Tasks
- 🔧 Maintenance
- 1 Inventory
- 📁 **Portfolio**

Home

Reminders - Tasks

- ▶ Notices
- ▶ My Team's Tasks
- ▶ My Tasks
- Create Task
- Create Unavailable Time
- All Tasks

Manage Tasks

- Key Work Task
- Material Order Task
- Schedule Task
- All 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	

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

- 2) Locate the **Assets Section**.
- 3) Click on the **Building Equipment** option.

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

▶ INFORMATION

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Portfolio

Geography
Organizations
Specifications

Locations
My Company
Building Equipment

Property
Divisions
Consumables

Buildings
Departments
Tools & Test Equipment

Land
Workgroups
Vehicles

Structures
People
Assets

Floors
Employees
Building Equipment

Spaces
External Contacts
Keys

Tools & Test Equipment

Vehicles



PROCESS

4) Click on the **Add** button.

<<Upon clicking, a new **Building Equipment Asset Record** screen will open in a new window>>

INFORMATION

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Building Equipment

Add to Bookmarks My Bookmarks

4 Add Delete | Inline View

Apply Filters Clear Filters

<input type="checkbox"/>	Asset Name	Asset ID	Specification Name	Description	Location
<input type="checkbox"/>	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	FAN - EXHAUST - BE...	75353	Exhaust Fan	BES-000095	
<input type="checkbox"/>	589080	EQ-1055560	Fire Door	NO DOOR, TAG ON ...	\Locations\Evanston Campus\Technologica
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73510	Condenser	BES-000048	
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73513	Condenser	BES-000048	
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73521	Air Conditioning Unit	BES-000003	
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73537	Air Conditioning Unit	BES-000003	
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73812	CRAC Unit	BES-000051	\Locations\Evanston Campus\Mudd Hall\01
<input type="checkbox"/>	AHU - HEAT PUMP -...	75063	Air Handling Unit	BES-000007	
<input type="checkbox"/>	AHU - HEAT PUMP -...	75064	Air Handling Unit	BES-000007	

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PROCESS

To complete the **Asset Record**, provide the following information:

Start on the **General** tab.

5) General section:

- a) **ID** – Asset Bar Code.
- b) **Name** – the name of the asset AND a separate tag number other than ID if it exists.
- c) **Description** – location and what the asset does.
- d) **Image** – upload any images from your computer if available using the upload icon.

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General | Contacts | Details | Graphics | Contracts | Assessment | Environmental | Operating Schedule | Maintenance | History | Notes & Documents Create Draft x

(Required): General information for the Asset.

General

5a ID Status 5d **Image**

5b * Name

5c Description

Serial Number

* Bar Code Entry

Condition Building System Class

Reservable

Maintenance Priority

Organization

Primary Location

Units

* Currency

Spec Information

* Specification Name

Spec ID Spec Class

Brand Model Number

PM Schedules

0 total found Show: 20

<input type="checkbox"/>	! ID	PM Name	Job Plan
No data to display			



PROCESS

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

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General | Contacts | Details | Graphics | Contracts | Assessment | Environmental | Operating Schedule | Maintenance | History | Notes & Documents Create Draft x

(Required): General information for the Asset.

General

ID Status Image

* Name

Description

Details

6a **Serial Number**

6b * **Bar Code Entry** **Building System Class**

6c **Maintenance Priority**

Organization

6d **Primary Location**

Units

* Currency **US Dollars**

Spec Information

* **Specification Name**

Spec ID **Spec Class**

Brand **Model Number**

PM Schedules

0 total found Show: 20

	! ID	PM Name	Job Plan
No data to display			



PROCESS

7) Spec Information section:

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

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General | Contacts | Details | Graphics | Contracts | Assessment | Environmental | Operating Schedule | Maintenance | History | Notes & Documents Create Draft x

Organization
 Primary Location

Units

* Currency

Spec Information

7a) * Specification Name

7b) Spec ID

7c) Spec Class

7d) Brand

7e) Model Number

0 total found Show: 20

ID	PM Name	Job Plan
No data to display		

Tasks

Related Reports Tasks (Excludes Planned)

0 total found

ID	Task Name	Status	Planned Start	Planned End	Actual Start	Actual End	Resolution Description	Actual Total Cost
No data to display								
								.00

Spec Class Data Attributes

Name	Value	Units
No data to display		

Asset Status Assign Lost



PROCESS

8) **PM Schedules** section will be filled in based on the Specification Type entered

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notes & Documents Create Draft x

Organization

Primary Location

Units

* Currency

Spec Information

* Specification Name

Spec ID

Brand

Spec Class

Model Number

PM Schedules

0 total found Show: 20

<input type="checkbox"/> ! ID	PM Name	Job Plan
No data to display		

Tasks

Related Reports Tasks (Excludes Planned)

0 total found

<input type="checkbox"/> ! ID	Task Name	Status	Planned Start	Planned End	Actual Start	Actual End	Resolution Description	Actual Total Cost
No data to display								.00

Spec Class Data Attributes

<input type="checkbox"/>	Name	Value	Units
No data to display			

Asset Status Assign Lost



PROCESS

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

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

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General | Contacts | Details | Graphics | Contracts | Assessment | Environmental | Operating Schedule | Maintenance | History | Notes & Documents Create Draft x

0 total found

<input type="checkbox"/> ! ID	Task Name	Status	Planned Start	Planned End	Actual Start	Actual End	Resolution Description	Actual Total Cost
No data to display								
								.00

Spec Class Data Attributes

<input type="checkbox"/> Name	Value	Units
No data to display		

Asset Status Assign | Lost

In Service Date **Asset Status**

Ownership Status

Warranty Status

Out Of Service Date

Parent Asset 9 Find Clear

ID

Name

Building Systems **Component Assets** Specifications (Parts List)

Component Assets 10 Find Remove

<input type="checkbox"/> ! Status Color	ID	Asset Name	Status
No data to display			

Show: 10

Create Draft x



▼ PROCESS

Move to the **Contacts** tab.

11) **Contacts**– add any important contacts, such as the main Supervisor for the department where the asset is located

a) Click on the **Add Person** button.

<<Upon clicking, the Add Person sub-window will open in the Asset Record >>

b) Use the **Name** or **Primary Organization** fields to search for your contacts.

c) Click the **checkbox** next to the Contact you want to add.

d) Click **OK** to save the contact.

▶ INFORMATION

Building Equipment: Add To Bookmarks Print Help

General **Contacts** Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notes & Documents Create Draft x

(Optional): Maintain a list of Contacts and their roles for the Building Equipment.

Contacts 11a Add Person Remove

0 total found Show: 10

<input type="checkbox"/> ! Role	Person	Work Phone	Fax	Email	Primary Organization
No data to display					

Create Draft 11d OK ✓ Cancel x

People Apply Filters Clear Filters

11b	Name	Employee ID	NetID	Title	Primary Organization
	goldstein	Contains	Contains	Contains	Contains
11c <input checked="" type="checkbox"/>	Goldstein,Evan L	1104051	elg5396	Reliability Engineer	\Organizations\Workgroups\Facilitie

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▼ PROCESS

Move to the **Details** tab.

12) Add any important information regarding the physical details of the Asset.

▶ INFORMATION

Building Equipment: Add To Bookmarks Print Help

General 12 **Details** Graphics Contracts Assessment Environmental Operating Schedule Maintenance History Notes & Documents
Create Draft x

(Optional): Details for Building Equipment.

Units

Length Units Energy Unit

Dimensions

Width feet Depth feet
 Height feet Weight

Details

Capacity <input type="text"/>	Belt <input type="text"/>
Voltage <input type="text"/>	Amps <input type="text"/>
Refrigerant <input type="text"/>	RPM <input type="text"/>
Filter Size <input type="text"/>	Charge <input type="text"/>
HP <input type="text"/>	GPM <input type="text"/>
State ID <input type="text"/>	FT/HD <input type="text"/>
Frame <input type="text"/>	KVA <input type="text"/>
KW <input type="text"/>	BtuH <input type="text"/>
SEER <input type="text"/>	Annual Fuel Utilization Efficiency <input type="text"/>

Create Draft x

PROCESS

Move to the **Notes & Documents** tab.

13) Comments – option to add any important information regarding Asset's history, location, or status.

Click the **Add** button to add a new comment.

14) Related Documents – option to add any photos or documents related to the Asset, such as

Click the **Add** button to add a new file.

INFORMATION

Building Equipment: Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History **Notes & Documents** Create Draft x

(Optional): Reference related documents or review comments to the record.

Comments 13 Add Remove

0 total found Show: 20

<input type="checkbox"/>	! Comment Type	Created By	Reference Date	Comment
No data to display				

Related Documents 14 Find Remove Upload

0 total found Show: 20

<input type="checkbox"/>	! Document Name	Document Description
No data to display		

Create Draft x



▼ PROCESS

Once you have added all the necessary information to the new Asset Record,

15) Click on the **Create Draft** button.

▶ INFORMATION

Building Equipment: Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance History **Notes & Documents** 15 Create Draft x

(Optional): Reference related documents or review comments to the record.

Comments Add Remove

0 total found Show: 20

<input type="checkbox"/> ! Comment Type	Created By	Reference Date	Comment
No data to display			

Related Documents Find Remove Upload

0 total found Show: 20

<input type="checkbox"/> ! Document Name	Document Description
No data to display	

Create Draft 15



PROCESS

Once the Draft has been created,

- 16) Click on the **Activate** button to complete the New Asset.

<<Upon clicking, the Asset screen will close and you will return to the Portfolio window>>

INFORMATION

Building Equipment: 123456-Air Handler 998877

Add To Bookmarks Print Help

General Contacts Details Graphics Contracts Assessment Environmental Operating Schedule Maintenance Hist **16** **Activate** Save Save & Close More x

(Required): General information for the Asset.

General

ID 123456 Status Draft Image

* Name Air Handler 998877

Description BES-000007

Details

Serial Number

* Bar Code Entry 123456

Condition Excellent Building System Class

Reservable

Maintenance Priority

Organization

Primary Location

Units

* Currency US Dollars

Spec Information

* Specification Name Air Handling Unit

Spec ID BES-000007 Spec Class HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)

Brand Model Number

PM Schedules

0 total found Show: 20

ID	PM Name	Job Plan
No data to display		



▶ INFORMATION

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

Click on the Asset Name to open the Asset Record.

▼ PROCESS

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Building Equipment Add to Bookmarks My Bookmarks

Inline View Add Delete

Apply Filters Clear Filters

<input type="checkbox"/>	Asset Name	Asset ID	Specification Name	Description	Location
<input type="checkbox"/>	Contains	12	Contains	Contains	Contains
<input type="checkbox"/>	AC UNIT - SPLIT SY...	73812	CRAC Unit		BES-000051
<input type="checkbox"/>	AHU - INDOOR UNIT...	73412	Air Handling Unit	BES-000007	\Locations\Evanston Campus\Ryan/Wilson/Walters Athletic
<input type="checkbox"/>	Air Compressor	12531	Air Compressor		\Locations\Evanston Campus\Cook Hall (Mlsb)\03\03114
<input type="checkbox"/>	Air Compressor	13312	Air Compressor	1	\Locations\Evanston Campus\Catalysis Center\BT\00B07
<input type="checkbox"/>	Air Compressor	15512	Air Compressor	COMP-3	\Locations\Evanston Campus\Cook Hall (Mlsb)\PH\05000
<input type="checkbox"/>	Air Compressor	31200	Air Compressor	COMP-3	\Locations\Evanston Campus\Lunt Building\BT\00B16
<input type="checkbox"/>	Air Compressor	31263	Air Compressor	AC-1	\Locations\Evanston Campus\Evanston Utility Pla\GR
<input type="checkbox"/>	Air Compressor	31264	Air Compressor	AC-2	\Locations\Evanston Campus\Evanston Utility Pla\GR
<input type="checkbox"/>	Air Compressor	31295	Air Compressor		\Locations\Evanston Campus\Evanston Utility Pla\LL

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