



Asset Manager

MANAGING ASSETS: BUILDING EQUIPMENT



MANAGING ASSETS: BUILDING EQUIPMENT

DOCUMENT SUMMARY

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)

Version **1.3** Release Date **10/25/2024**

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 (03/04/22)**

REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.2	10/25/2024	Updated	NU Facilities
	1.1	03/04/2022	Updated	NU Facilities
	1.0	04/24/2019	Created	NU Facilities
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TABLE OF CONTENTS

This document has been structured by the key topic(s) and process(es) involved in the management of building equipment assets. Please view the table below to locate a specific topic or process contained within the document.

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GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to review, modify, and create **Building 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-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	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 **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 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
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- Home
- Requests
- Projects
- Tasks
- Maintenance
- 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
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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

1

▼ 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

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Portfolio

Geography

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Spaces

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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

Add to Bookmarks

My Bookmarks



▶ 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):

- Page Title
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**.

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Building Equipment

Building Equipment Specif...

	Image	Name	Spec ID	Spec Class	Brand
<input type="checkbox"/>		Contains	Contains	Contains	Contains
<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)	

Items per page: 50 | 1 - 50 of 275 items | 1 of 6 pages



▶ 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 bottom left of the screen

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Building Equipment

Add to Bookmarks My Bookmarks

Inline View

Add | Delete

Building Equipment Specification

Apply Filters Clear Filters

<input type="checkbox"/>	Image	Name	Spec ID	Spec Class	Brand
<input type="checkbox"/>		Contains	Contains	Contains	Contains
<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)	

Items per page: 50 1 - 50 of 275 items 1 of 6 pages



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

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Building Equipment

Building Equipment Specification

Image	Name	Spec ID	Spec Class	Brand
	Contains	Contains	Contains	Contains
<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)	

Items per page: 50 | 1 - 50 of 275 items | 1 of 6 pages

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

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Building Equipment


Add to Bookmarks My Bookmarks

Popup View

Add Delete

Building Equipment Specification

Apply Filters Clear Filters

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

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



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 \$,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.

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	<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	\$.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

Add To Bookmarks Print Help

Revise More x

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	<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

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

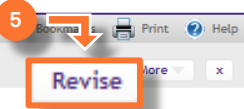
List Price \$5.00 US Dollars

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**.

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

Activate Save Find Remove



PROCESS

Process 1.2
Review an Existing Specification

Next, add a **Model Name**.

- Type the **Model Name** into the field.
- As you complete modifications to a **Building Equipment Specification** record, it's good practice to save your work by clicking on the **Save** button.
- Once all modifications have been recorded, click the **Activate** button to save and exit.

End of Process
 Next Process > 1.3 Create an New Specification

INFORMATION

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:

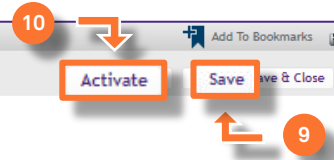
List Price: \$,00 US Dollars | Purchase Units: Quantity each

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

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Building Equipment

Add to Bookmarks My Bookmarks

11 Add Delete

Building Equipment Specification

Apply Filters Clear Filters

	Image	Name	Spec ID	Spec Class	Brand	Model Number
<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 Tool	BES-000010	HEATING, VENTILATION, AND AIR CONDITIONING (HVAC)		

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PROCESS

Process 1.3 Create a New Specification

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

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

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

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

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

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

INFORMATION

Building Equipment Spec: General Details Products Inventory Maintenance Self Service Notifications Notes & Documents Activate Create Draft x

(Required): General information for Building Equipment Spec.

12 - **General**

ID Status Image

* **Name**

Description

13 - **Details**

Spec Type Specification

* **Spec Class**

Spec Group

Created by

Manage as Inventory

Self Service Request

14 - **Service Class**

Construction Class

Building System Class

Contains Haz Mat

Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer Find | Clear

Manufacturer Details

Brand

Model Name

Product Code

List Price US Dollars

Model Number

Product Code Type

Purchase Units each

Item Cost

Item Use Cost

Entitlements Find | Remove

Activate Create Draft x



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**

(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

Create Draft



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 Self Service Request Contains Haz Mat Move Item

Environmental Details

Spec Class Data Attributes

Units

Manufacturer Find Clear

Manufacturer Details

Brand Model Name Model Number

Product Code Product Code Type

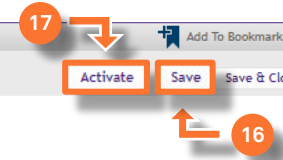
List Price \$.00 US Dollars Purchase Units Quantity each

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

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Portfolio

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 - Building Equipment
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 - 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 bottom left of the screen

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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"/>	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	

Items per page: 50 1 - 50 of 56912 items 1 of 1139 pages



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

Building Equipment

Building Equipment

Asset Name	Asset ID	Specification Name	Description	Location
Contains	Contains	Contains	Contains	Contains
<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

Items per page: 50 1 - 50 of 56912 items 1 of 1139 pages



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

Northwestern | FACILITIES CONNECT

Building Equipment

Add to Bookmarks My Bookmarks

Popup View

Add Delete

Apply Filters Clear Filters

<input type="checkbox"/>	!	Asset Name	Asset ID	Specification Name	Description	Location	Status	Organization
		ELECTRIC WATE	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>		Electric Water Heater	10218	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	10233	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>	20	Electric Water Heater	10552	Electric Water Heater	WH-9	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	11030	Electric Water Heater	WH-20	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	11040	Electric Water Heater	WH-20	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13045	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13059	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13435	Electric Water Heater		\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	14227	Electric Water Heater		\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	14232	Electric Water Heater	WH-6	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	19645	Electric Water Heater		\Locations\Chicago ...	Active	
<input type="checkbox"/>		Electric Water Heater	26683	Electric Water Heater		\Locations\Chicago ...	Active	
<input type="checkbox"/>		Electric Water Heater	27216	Electric Water Heater		\Locations\Evansto...	Active	

Items per page: 50 1 - 46 of 46 items 1 of 1 pages



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

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

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.

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 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

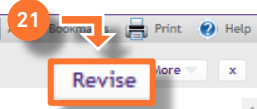
Out Of Service Date

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 (Parent)

Building Systems

Building | Floor | ID | Name

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

Activate | Save | Save & Close | More | x



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

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

Assign Lost

Find Clear

Find Remove



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

Building Equipment

Add to Bookmarks My Bookmarks

Building Equipment

<input type="checkbox"/>	!	Asset Name	Asset ID	Specification Name	Description	Location	Status	Organization
		ELECTRIC WATE	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>		Electric Water Heater	10218	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	10233	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	10552	Electric Water Heater	WH-9	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	11030	Electric Water Heater	WH-23	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	11040	Electric Water Heater	WH-20	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13045	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13059	Electric Water Heater	WH-EL	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	13435	Electric Water Heater		\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	14227	Electric Water Heater		\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	14232	Electric Water Heater	WH-6	\Locations\Evansto...	Active	
<input type="checkbox"/>		Electric Water Heater	19645	Electric Water Heater		\Locations\Chicago ...	Active	
<input type="checkbox"/>		Electric Water Heater	26683	Electric Water Heater		\Locations\Chicago ...	Active	
<input type="checkbox"/>		Electric Water Heater	27216	Electric Water Heater		\Locations\Evansto...	Active	

Items per page: 50 1 - 46 of 46 items 1 of 1 pages



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: Add To Bookmarks Print Help

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

(Required): General information for the Asset.

28 - General

ID Status Image

*** Name**

Description

29 - Details

Serial Number

*** Bar Code Entry**

Condition 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 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



PROCESS

Process 2.3
Create a New Asset

Beyond the required information, it can be very important to add the **Primary Location** of the Asset.

To add the Primary Location,

- 31) Click on the **magnifying glass icon**.
<<Upon clicking, the Location Search will open in the same window>>
- 32) Search for the location using the **column headers**.
- 33) Select the desired location using the **radio button** to the left of the space.
- 34) Click **OK** to save your selection.

INFORMATION

Building Equipment: Add To Bookmarks Print Help

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

(Required): General information for the Asset.

General

ID Status Image

* Name

Description

Details

Serial Number

* Bar Code Entry

Condition Building System Class

Reservable

Maintenance Priority

Organization

31 Primary Location

Units

Spec Information

* Specification Name

Spec ID

Brand

Spec Class Data Attributes

Asset Status

In Service Date Asset S

Ownership Status

Warranty Status

Out Of Service Date

Parent Asset

Building Systems Component Assets Specifications (Parts List)

Building Systems

Create Draft x

34 OK ✓ Cancel x

Location records of Spac... Apply Filters Clear Filters

32	Building	Floor	ID	
<input type="radio"/>	Contains	Contains	Contains	
<input type="radio"/>	1007 Church	02	R123-02-00203F	00203F
<input type="radio"/>	1007 Church	02	R123-02-00203G	00203G
<input type="radio"/>	1007 Church	02	R123-02-00204	00204
<input type="radio"/>	1007 Church	02	R123-02-00205	00205
<input type="radio"/>	1007 Church	02	R123-02-00207	00207
<input type="radio"/>	1007 Church	02	R123-02-00208	00208
<input type="radio"/>	1007 Church	02	R123-02-00209	00209
<input type="radio"/>	1007 Church	02	R123-02-00210	00210
<input type="radio"/>	1007 Church	02	R123-02-00211	00211
<input type="radio"/>	1007 Church	02	R123-02-00212	00212
<input type="radio"/>	1007 Church	02	R123-02-00213	00213

Items per page: 50 1 - 50 of 52660 items 1 of 1054 pages



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:

35) 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: Add To Bookmarks Print Help

35 **Create Draft** x

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 ID BES-000263 Spec Class

Brand Model Number

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

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.

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

37) 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

