Preventive Maintenance

Add a New Asset
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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)

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<th>Version</th>
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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)
To begin, access the Facilities Connect Home Screen.

In order to create Building Equipment Assets as outlined in this job guide, the user must:

- Possess the Asset Manager role and responsibilities.
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.

### Important

**Process**
- 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

**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

**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
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>>
2) Locate the Assets Section.

3) Click on the Building Equipment option.

<<Upon clicking, the Building Equipment screen will open in the main window>>
4) Click on the Add button.

<<Upon clicking, a new Building Equipment Asset Record screen will open in a new window>>
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.
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.
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.
8) **PM Schedules** section will be filled in based on the Specification Type entered.
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.
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. 
   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.
Move to the **Details** tab.

12) Add any important information regarding the physical details of the Asset.
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.
Once you have added all the necessary information to the new Asset Record, click on the **Create Draft** button.
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>>
To locate your new asset, enter keywords into the search fields. Click on the Asset Name to open the Asset Record.