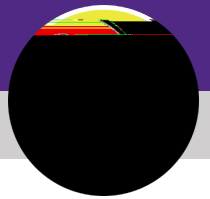

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MANAGING ASSETS: VEHICLES, TOOLS, AND TEST EQUIPMENT

VERSION 1.1
UPDATED 03/04/22

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.

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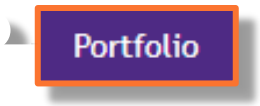
▼ PROCESS

1) To begin working with **Assets**, click on the **Portfolio** tab at the top of the **Facilities Connect Home Screen**

<<Upon clicking, the P[illegible] screen will open in the main window>>



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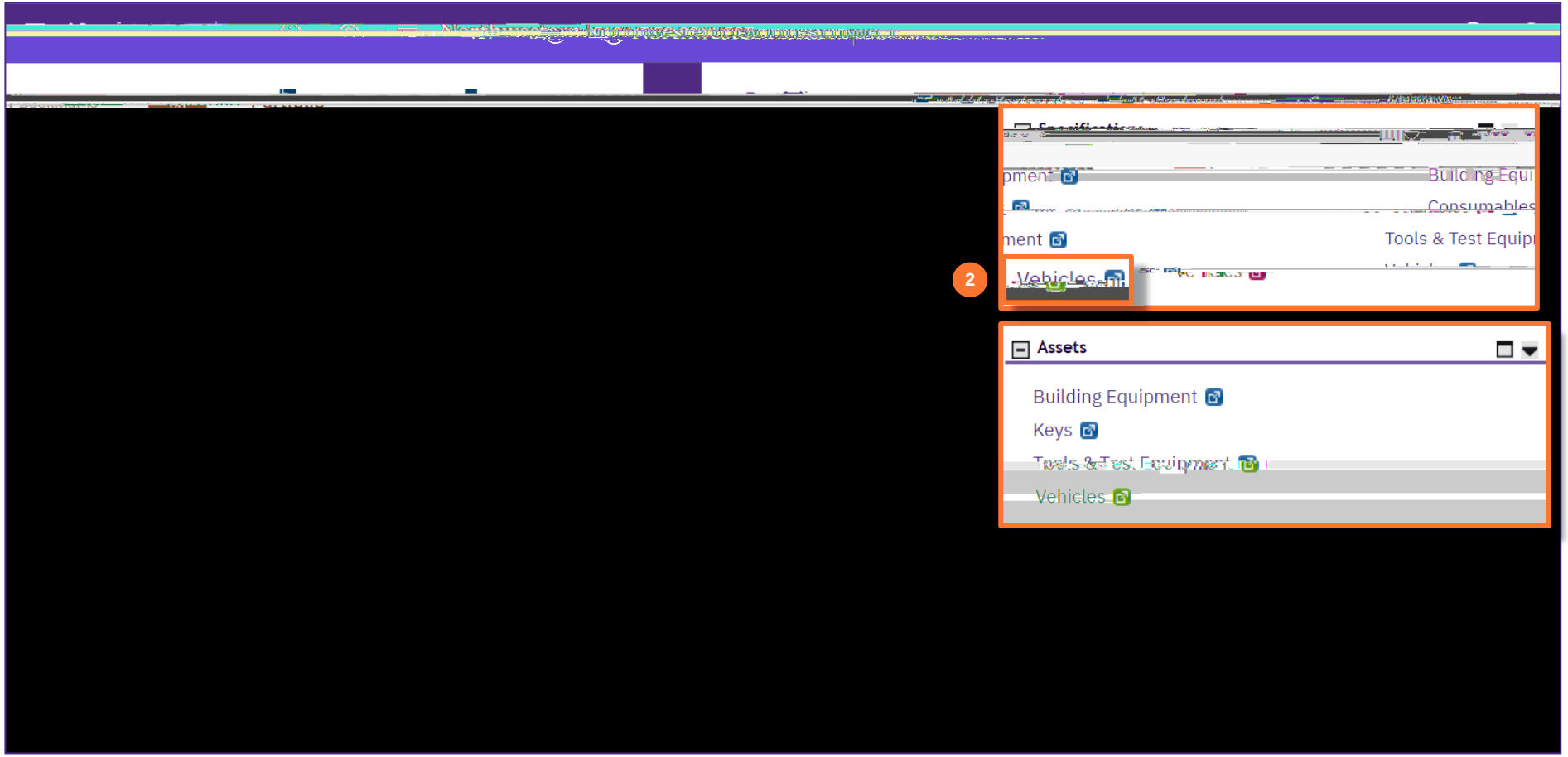
▼ PROCESS

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 V. ... S. ... screen will open in the main window>>



INFORMATION

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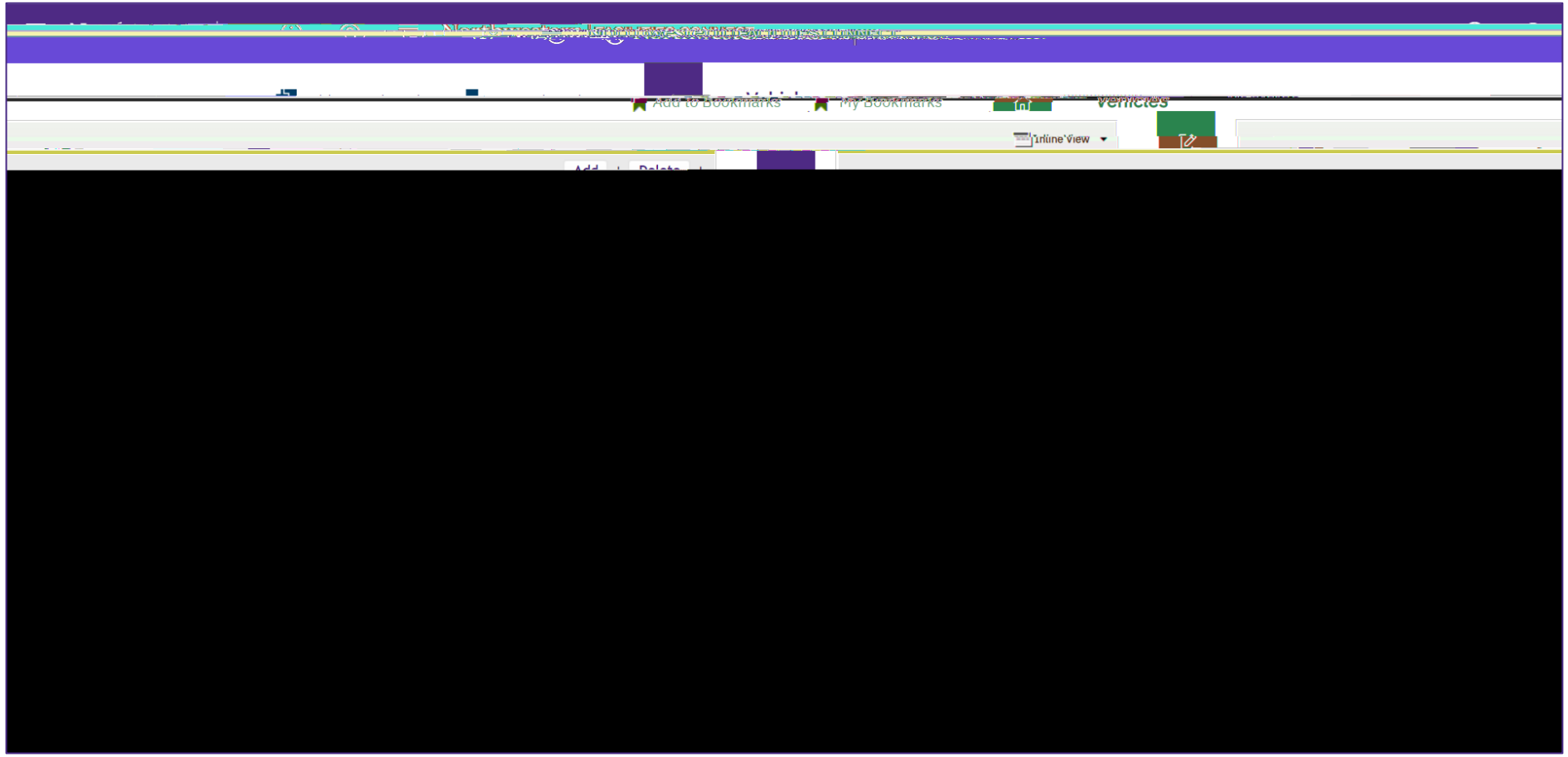
PROCESS

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**.



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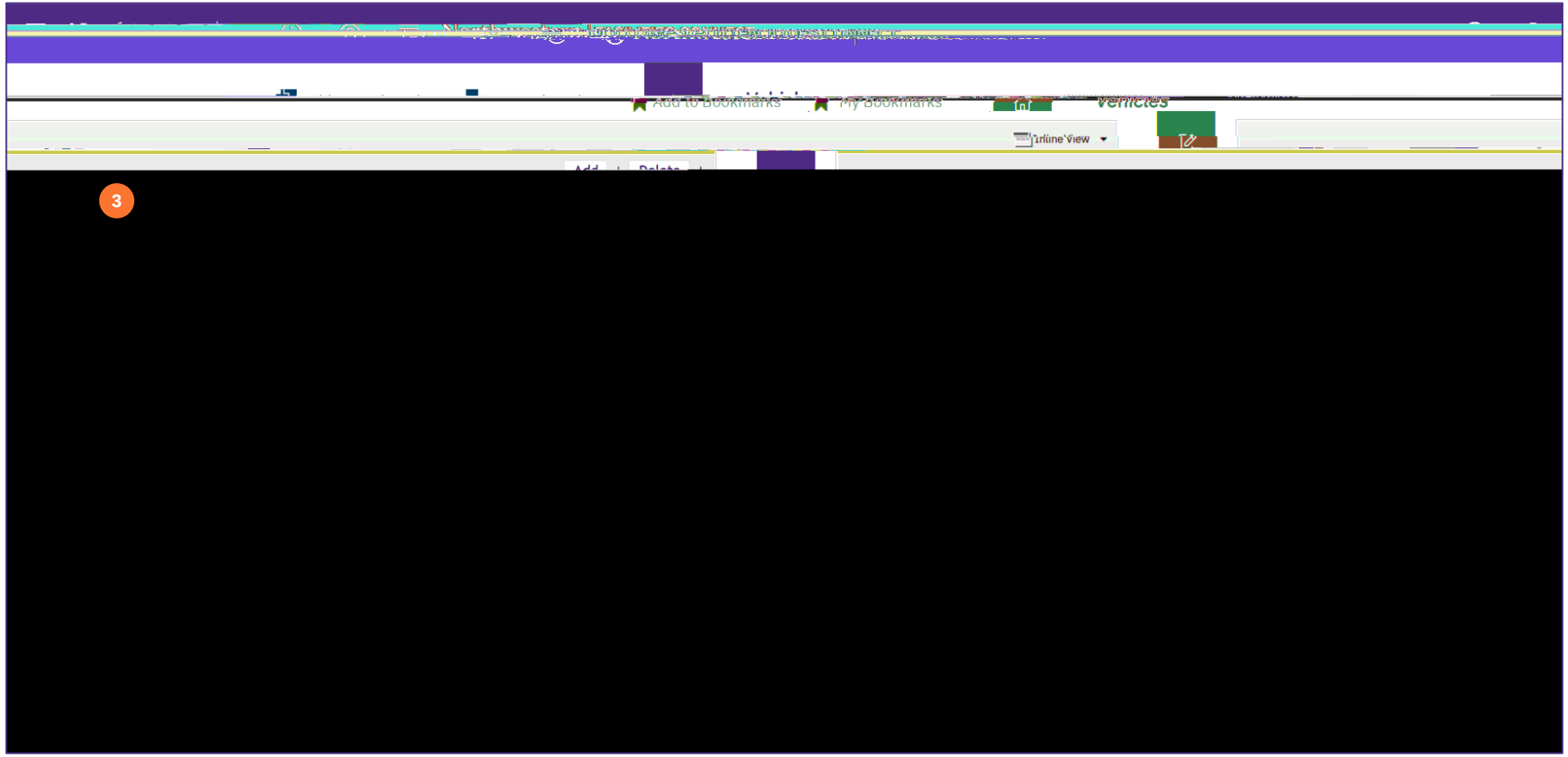
P 1.1

Locate an Existing Specification

Following Step #2, on the **Vehicles Specification** screen:

3) Use available **Sort / Filter**



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▼ PROCESS

P 1.1

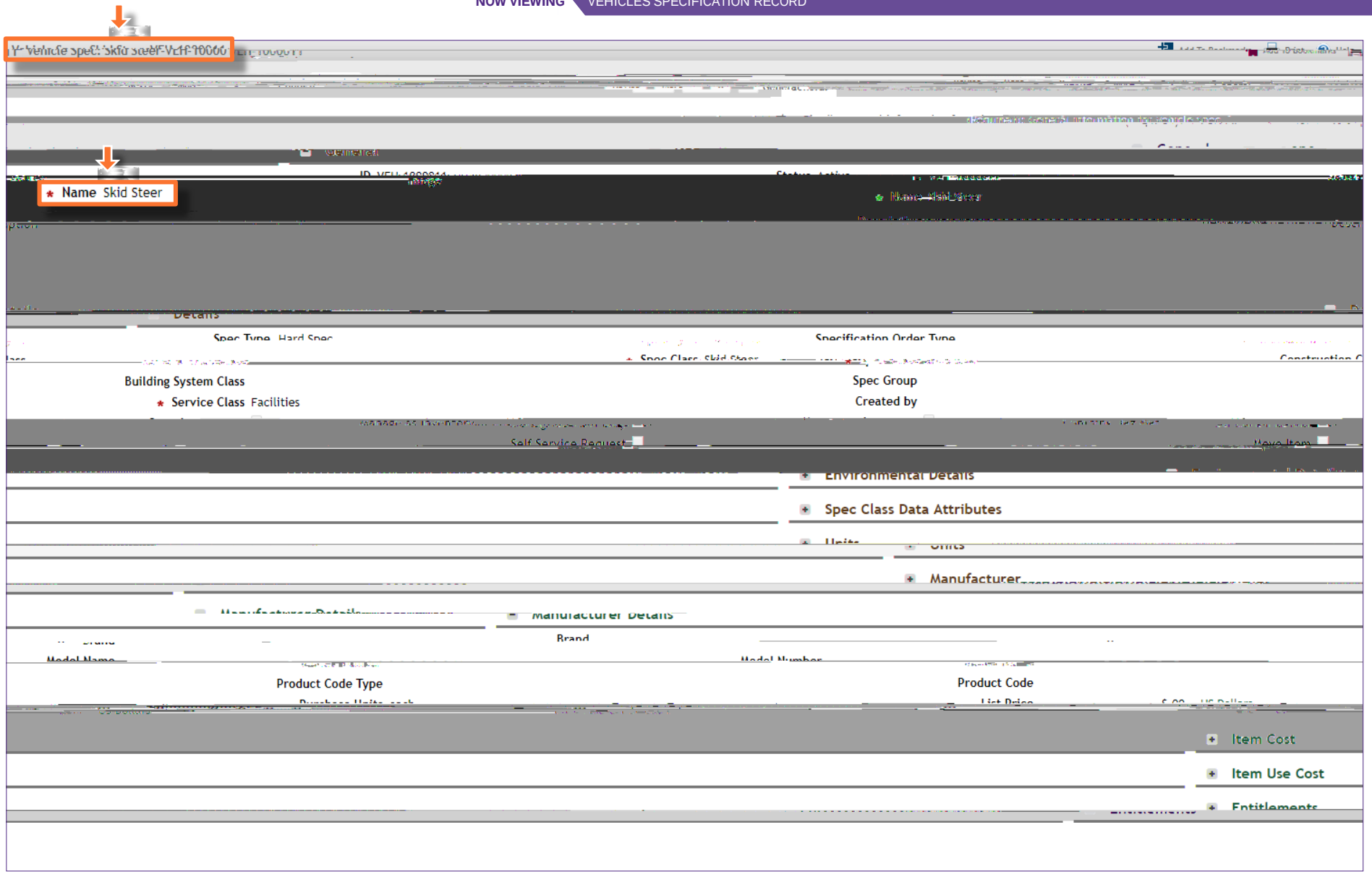
Locate an Existing Specification

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



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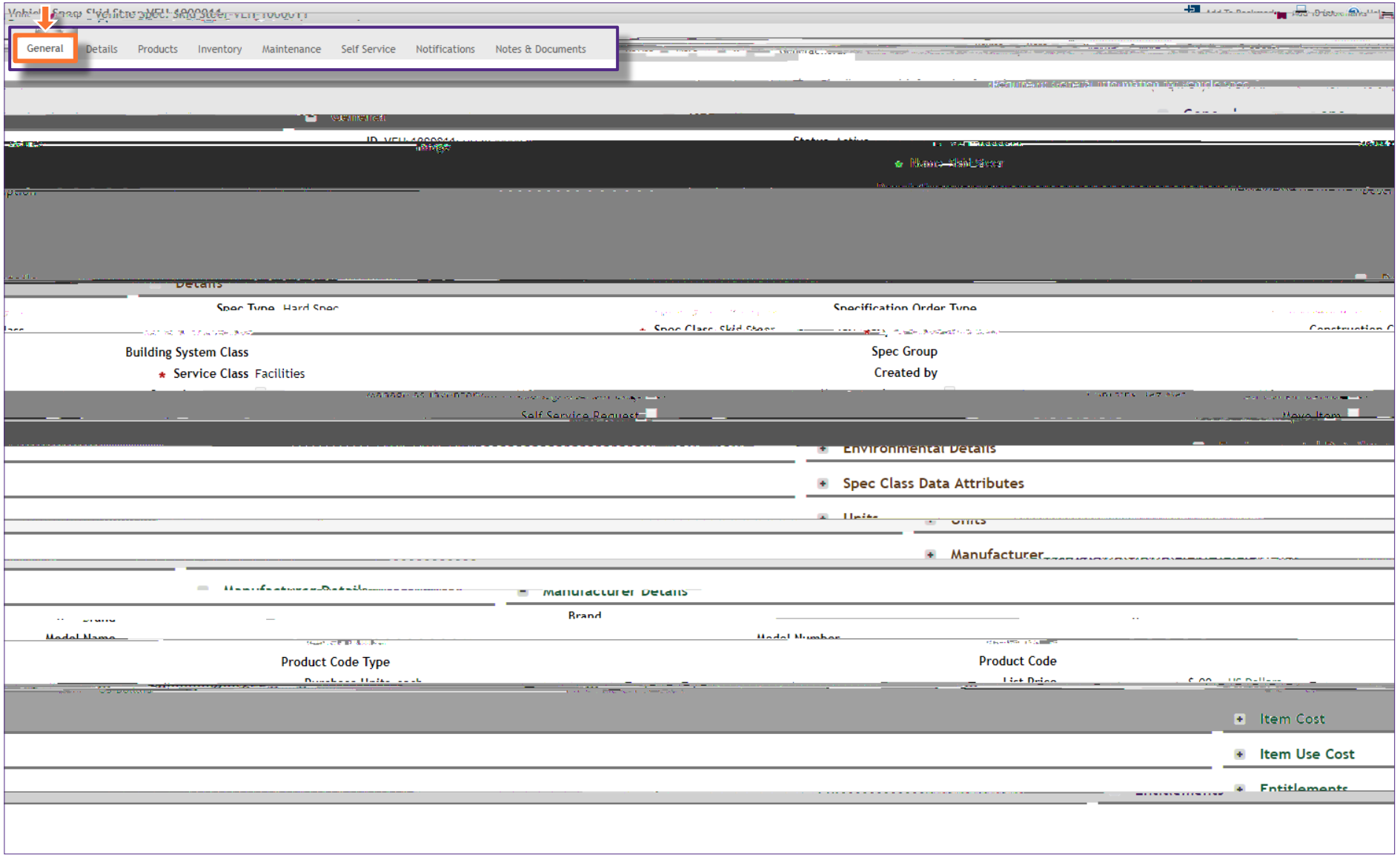
P 1.2

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



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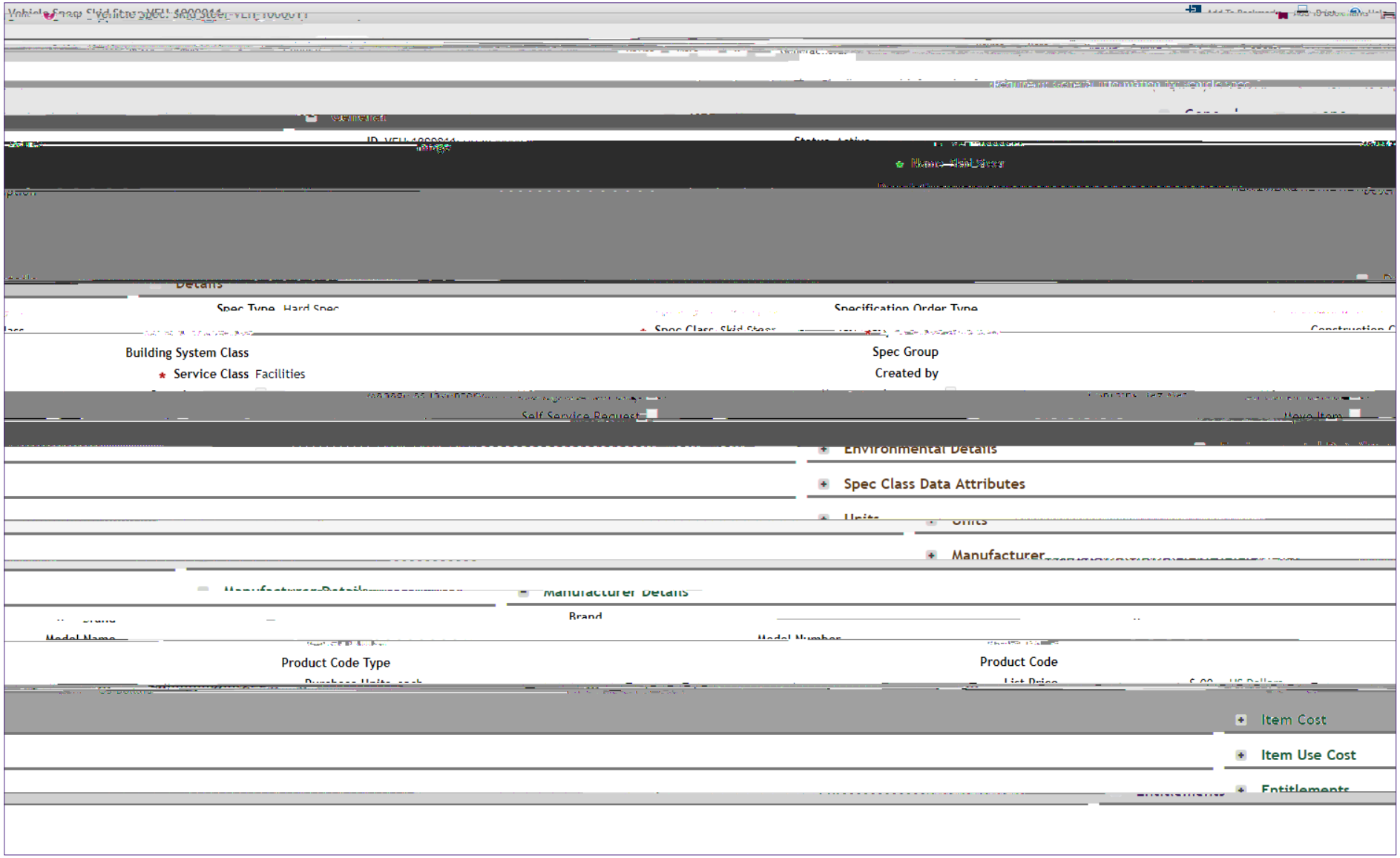
P 1.2

Review an Existing Specification

To modify a



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P 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 **B /C**

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▼ PROCESS

P 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 gpractice to sav
the **Save** button.

10) Once all modifications have been recorded,
click the **Activate** button to save an3108w 2exit.

End of Process

Next Process > 1.3 Create an New Specification

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▼ PROCESS

P 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.

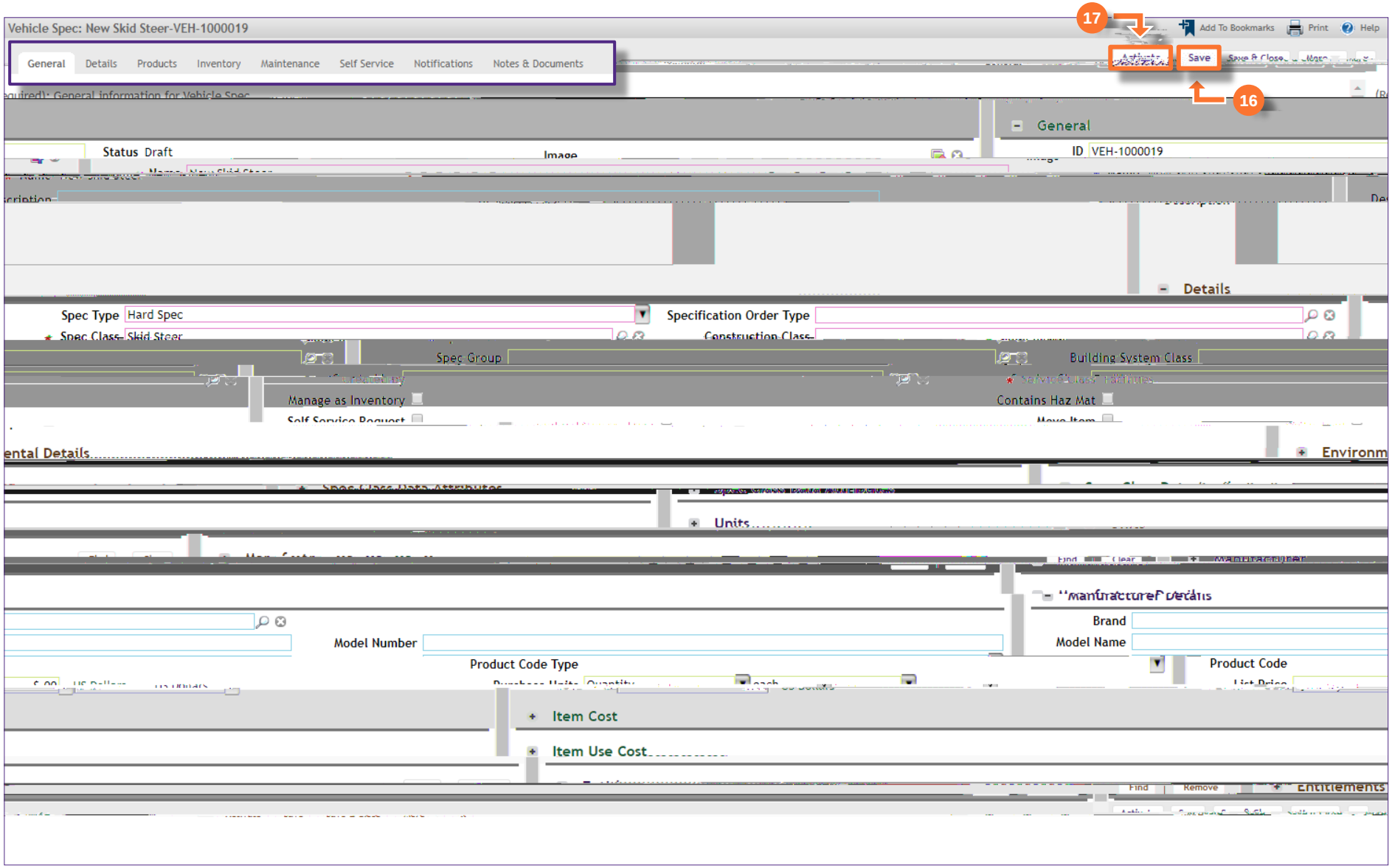
Note: Specification records contain a large number of data fields, several of which may not be used by NU Facilities.

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



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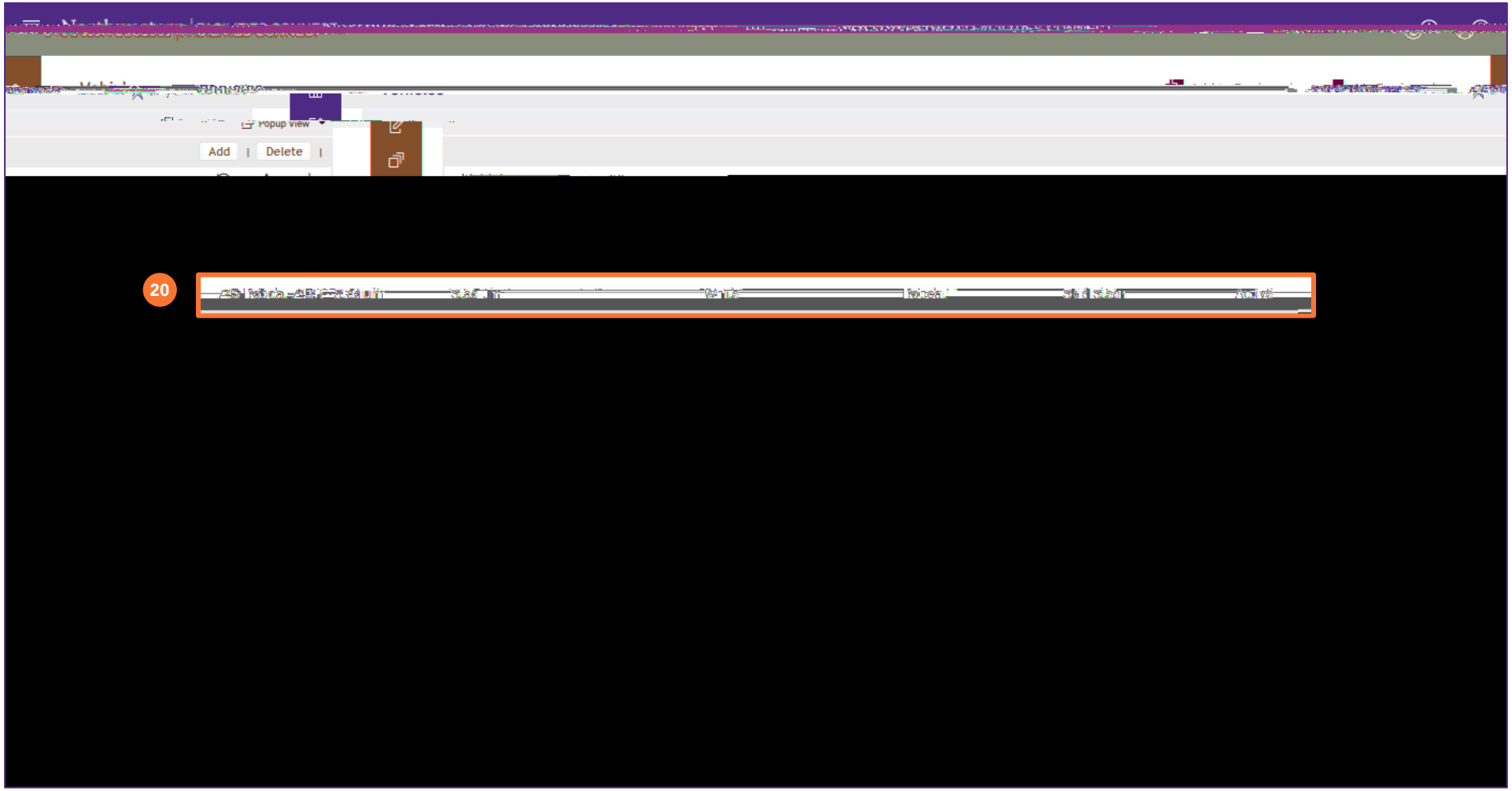
▼ PROCESS

P 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 V. , , . A , record will open in a new window>>



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▼ PROCESS

P 2.1

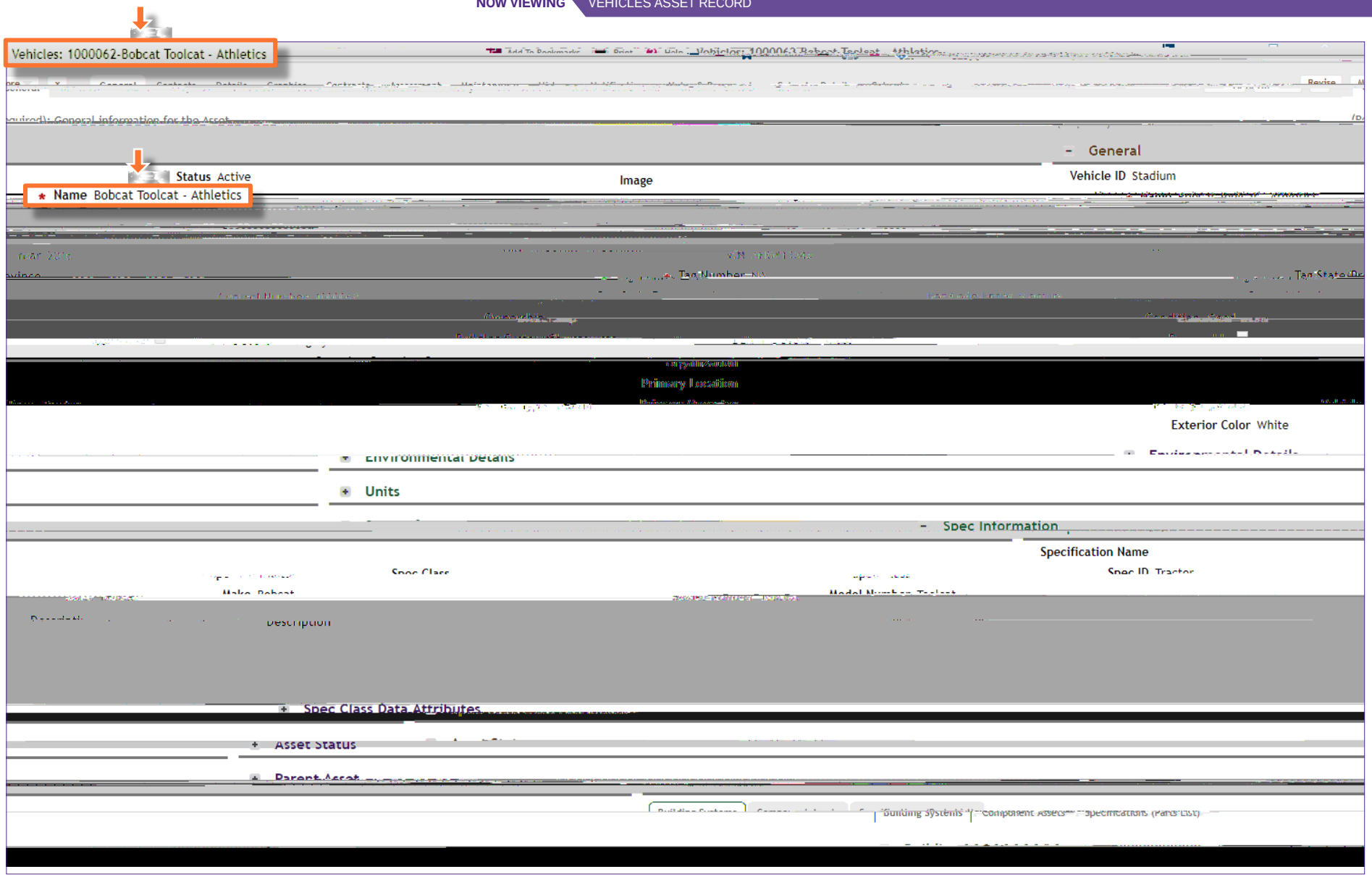
Locate an Existing Asset

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



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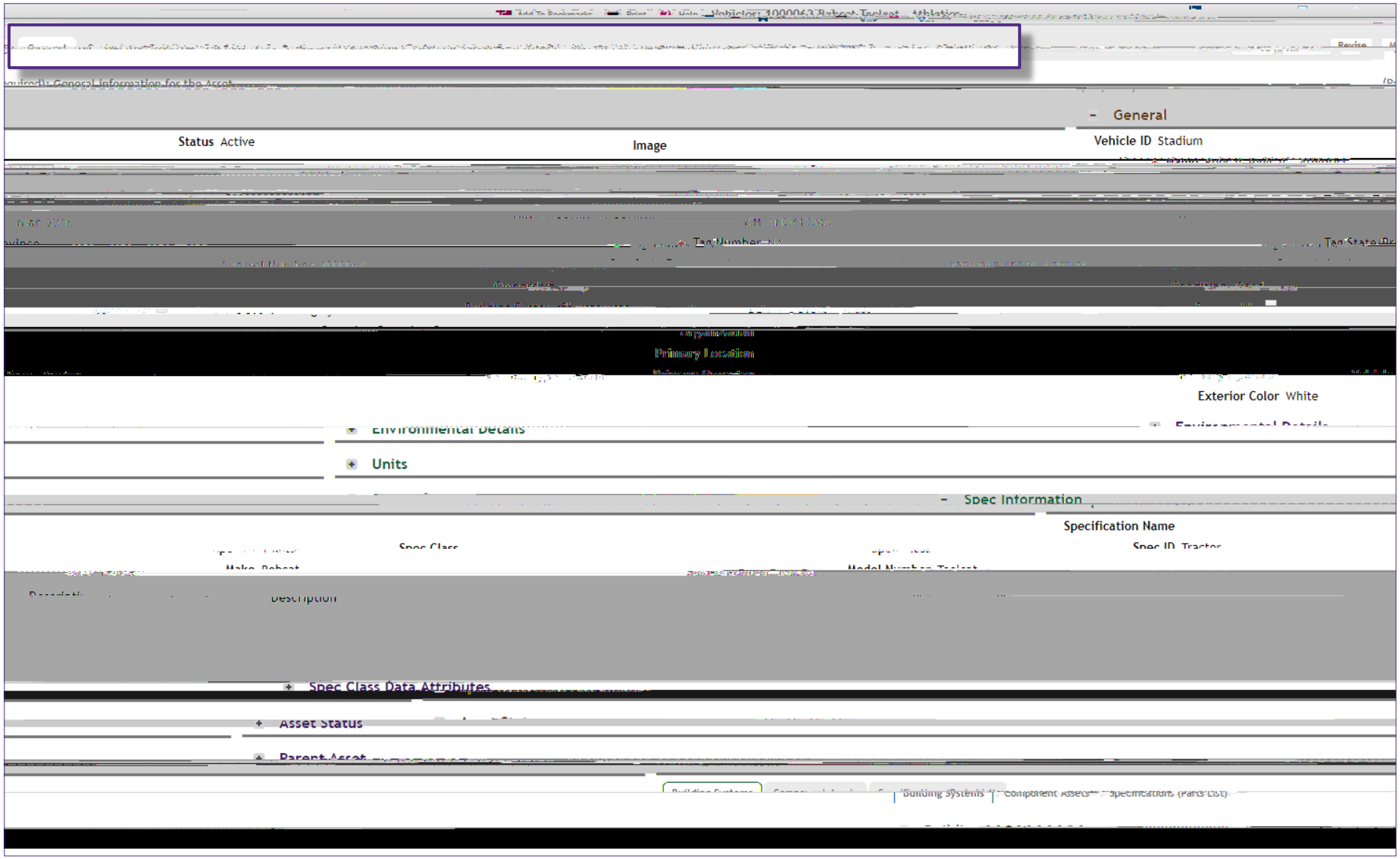
P 2.2

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



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PROCESS

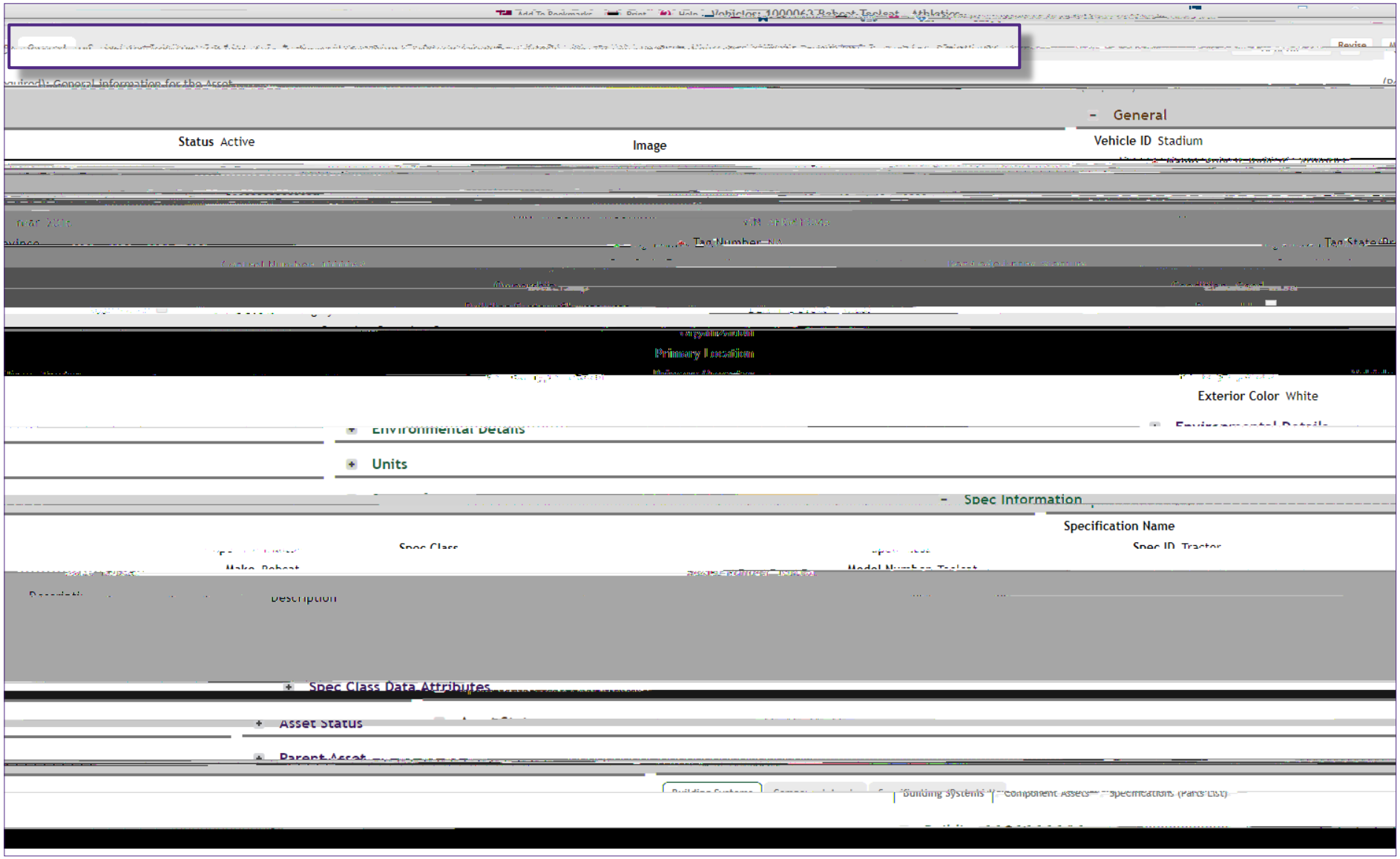
▼ INFORMATION

P 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



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▼ PROCESS

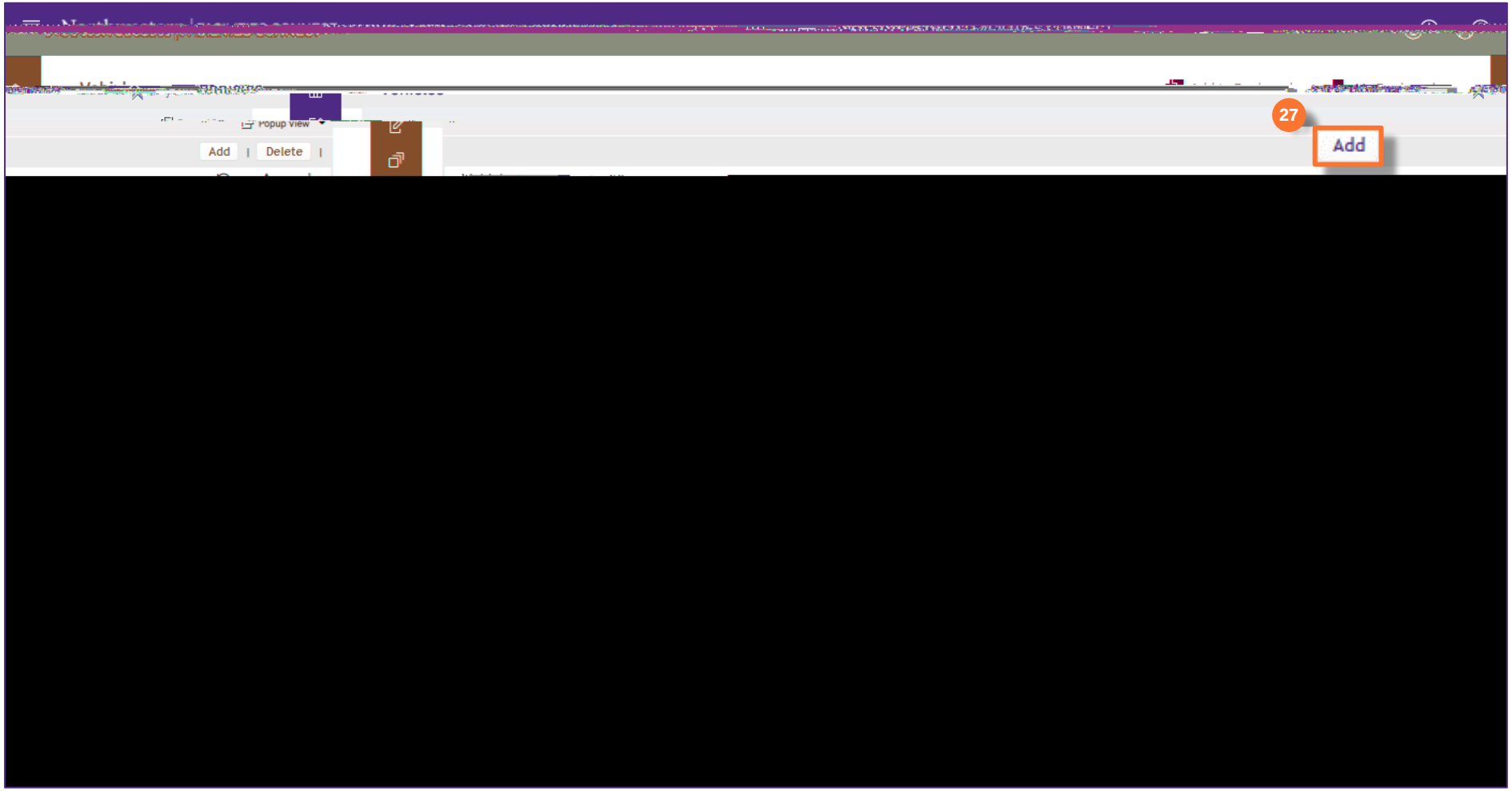
P 2.3

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 V. . A . record will open in a new window>>



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P 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 ame w ass Feeer in the **Tag Number** field.

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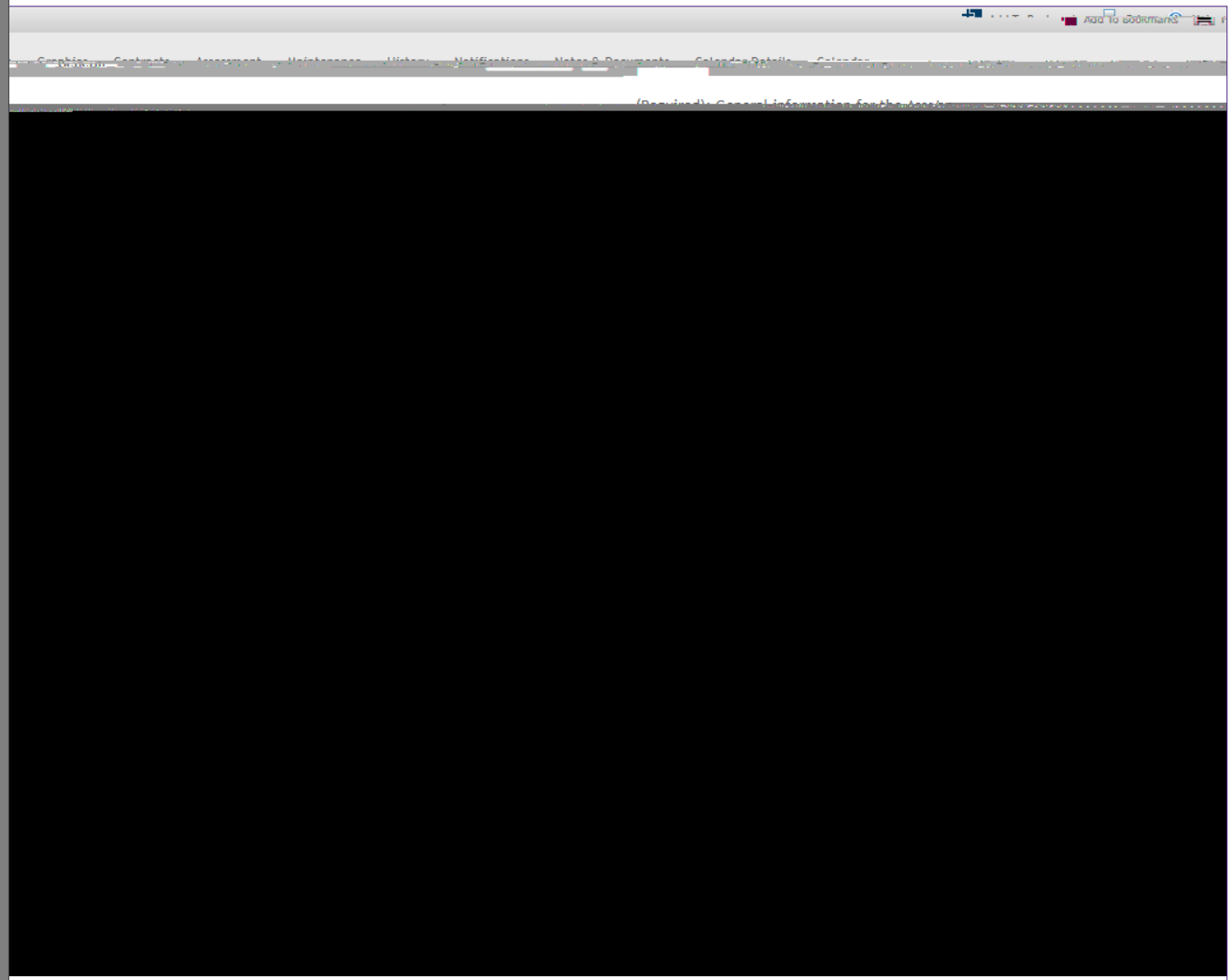
NOW VIEWING VEHICLES ASSET SCREEN



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