

## FACILITIES CONNECT REPORTING

# REPORT FUNCTIONALITY UPDATES 2022

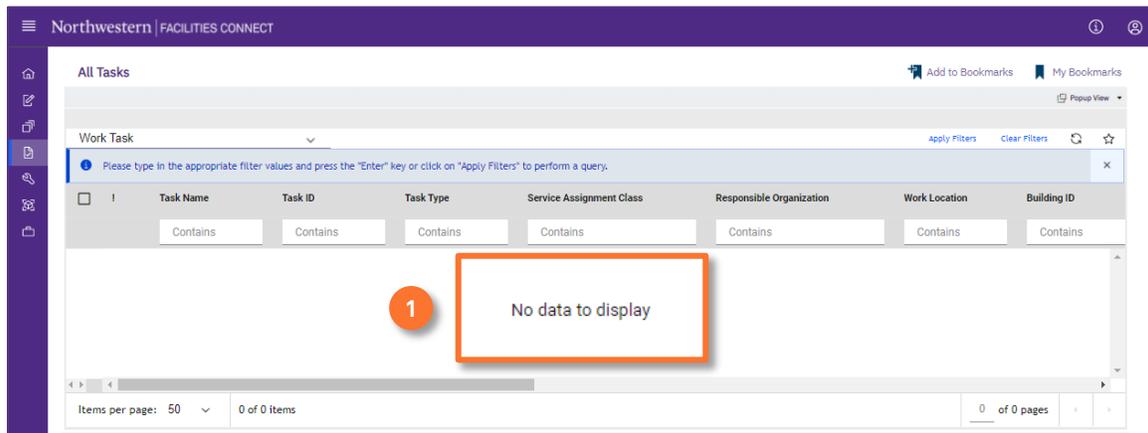
Provides guidance on the updated functionality of the Facilities Connect Reports as of the March 2022 Upgrade.

### DIRECTIONS:

1

Upon opening many of the reports, the default view will be **blank**.

A filter value is required to return any data. Unfiltered results have too many results to show

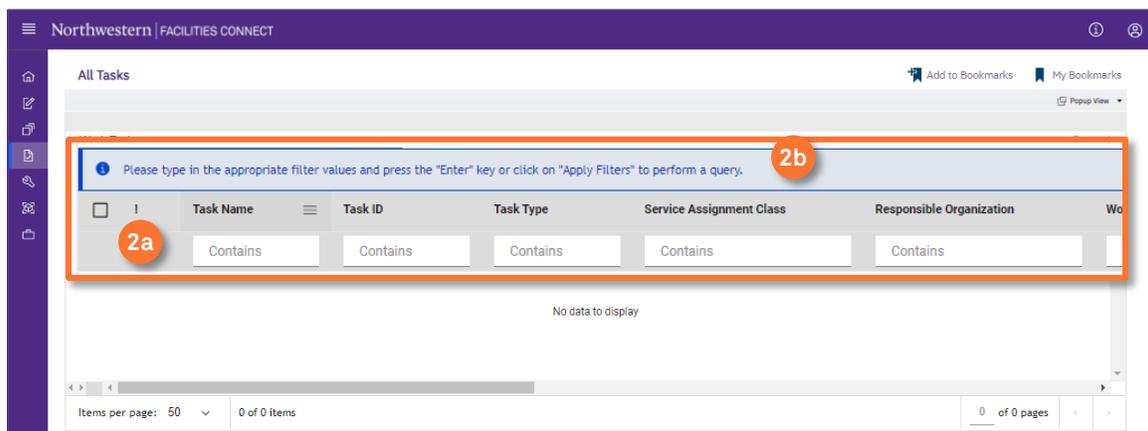


2

To initiate a search:

2a Enter criteria in any of the search fields beneath each of the column headers.

2b Press the **Enter** key.



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## DIRECTIONS

3

Once the report is populated, several features have moved locations on screen:

**3a** **Items per page:** bottom of page.

**3c** **Number of Pages:** bottom of page.

**3b** **Number of Items:** bottom of page.

**3d** **Export Report:** right hand report navigation bar.

The screenshot shows the 'All Tasks' report interface. Callout 3a points to the 'Items per page: 50' dropdown at the bottom left. Callout 3b points to the '1 - 50 of 7901 items' text at the bottom left. Callout 3c points to the '1 of 159 pages' pagination at the bottom right. Callout 3d points to the 'Export Report' icon (a download arrow) in the top right navigation bar.

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
WT-1055502 - Schedu...	WT-1055502	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1082945 - Schedu...	WT-1082945	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1083304 - Schedu...	WT-1083304	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1084594 - Cook H...	WT-1084594	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1102040 - Routin...	WT-1102040	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1087750 - Schedu...	WT-1087750	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1087838 - Routin...	WT-1087838	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...
WT-1088356 - Routin...	WT-1088356	Corrective	General Repairs & Maintenance	Central Painter	\Locations\Evanston Camp...

**3e** For reports that have **data ranges** or **additional filters**, the button to expand the filters has moved to the right hand report navigation bar:

The screenshot shows the 'Work Order Audit Report' interface. Callout 3e points to the filter expansion button (a double arrow icon) in the top right navigation bar. The report table has columns for Modified Date/Time and Created Date/Time, both with a 'Less Than or Equals' filter applied.

Modified Date/Time	Created Date/Time
Less Than or Equals	Less Than or Equals

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
WT-1083332	WT-1083332	Central Locksmith	\Locations\Evanston Campus\1007 Church\04\00412	1007 Church	R123
WT-1057528	WT-1057528	Central Engineer	\Locations\Evanston Campus	1033 University Pl	EV
WT-1029294	WT-1029294	Central Custodian	\Locations\Evanston Campus\1201 Davis	1201 Davis	8864
WT-1030478	WT-1030478	Central Electrician	\Locations\Evanston Campus\1201 Davis	1201 Davis	8864
WT-1030479	WT-1030479	Central Engineer	\Locations\Evanston Campus\1201 Davis\01\01400	1201 Davis	8864
WT-1031332	WT-1031332	Central Engineer	\Locations\Evanston Campus\1201 Davis\01\01701	1201 Davis	8864
WT-1031522	WT-1031522	Central Engineer	\Locations\Evanston Campus\1201 Davis\SG\SG010	1201 Davis	8864

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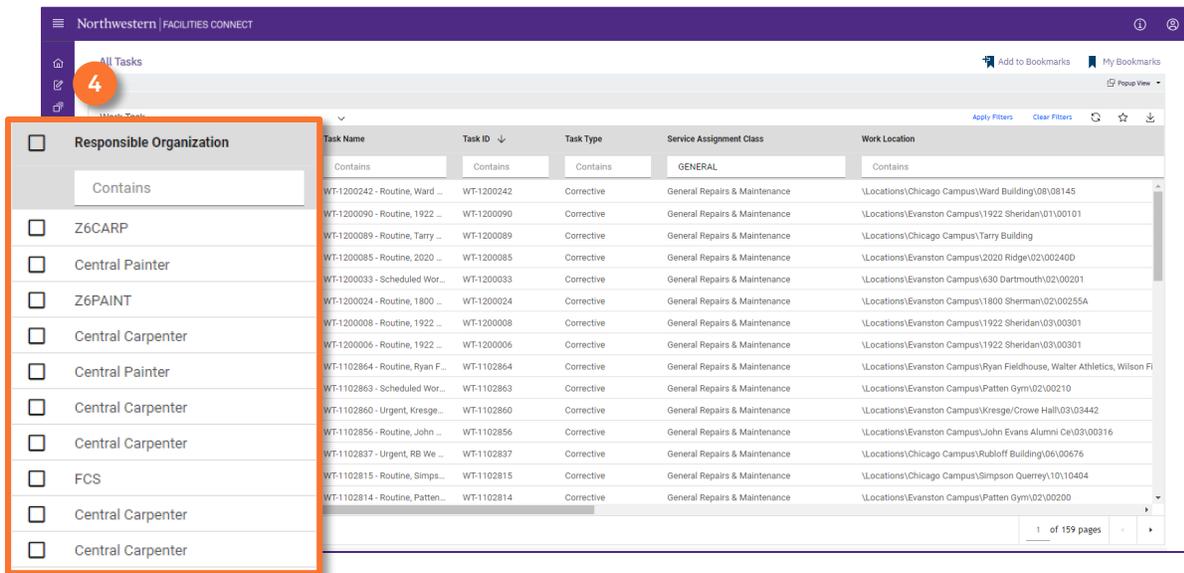
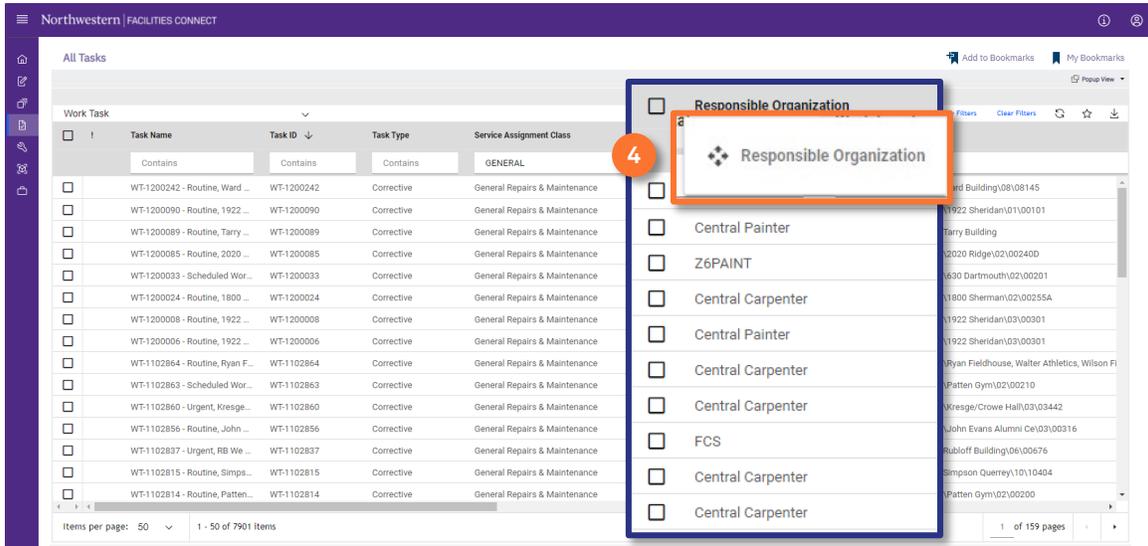
### DIRECTIONS

4

New column functionality:

4

Rearrange columns: click on the column you want to move and drag it into a new location.



▼ IMPORTANT

Any changes you make to a report **WILL NOT** save once you close or navigate away from the report.

## FACILITIES CONNECT REPORTING

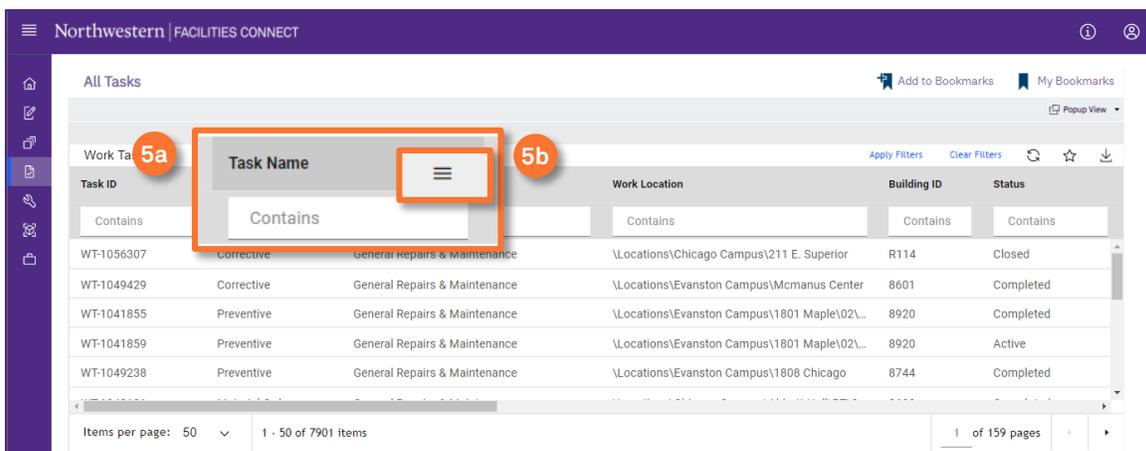
# REPORT FUNCTIONALITY UPDATES 2022

### DIRECTIONS

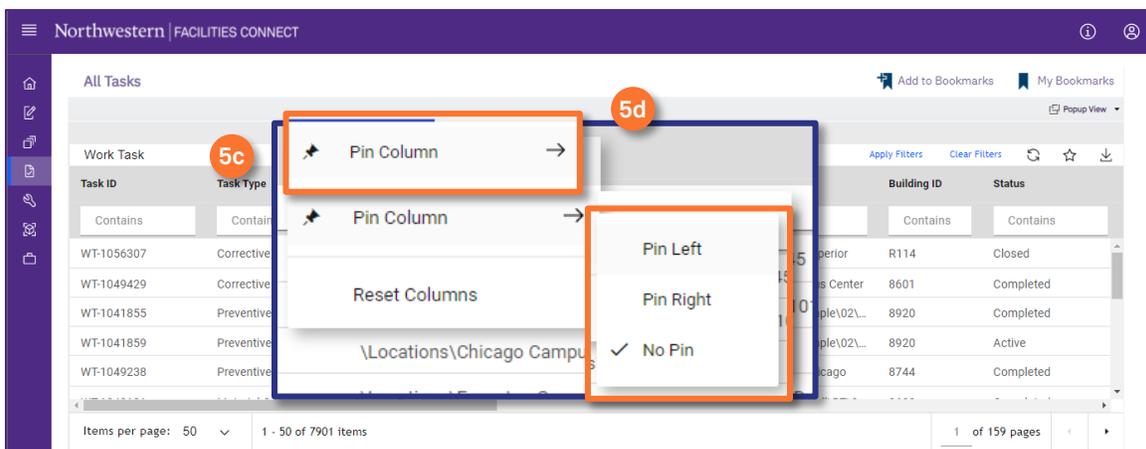
#### 5 New column functionality continued:

**Pin column:** freeze a column to the right or left of the report.

- 5a **Hover** over the column you want to pin until you see the three bar menu.
- 5b Click on the **three bar menu**, upon clicking the **drop down menu** will display.



- 5c Click on the **Pin Column** option.
- 5d Select **Pin Left** or **Pin Right**. This will decide as what location the column will freeze.



#### ▼ IMPORTANT

Any changes you make to a report **WILL NOT** save once you close or navigate away from the report.

## FACILITIES CONNECT REPORTING

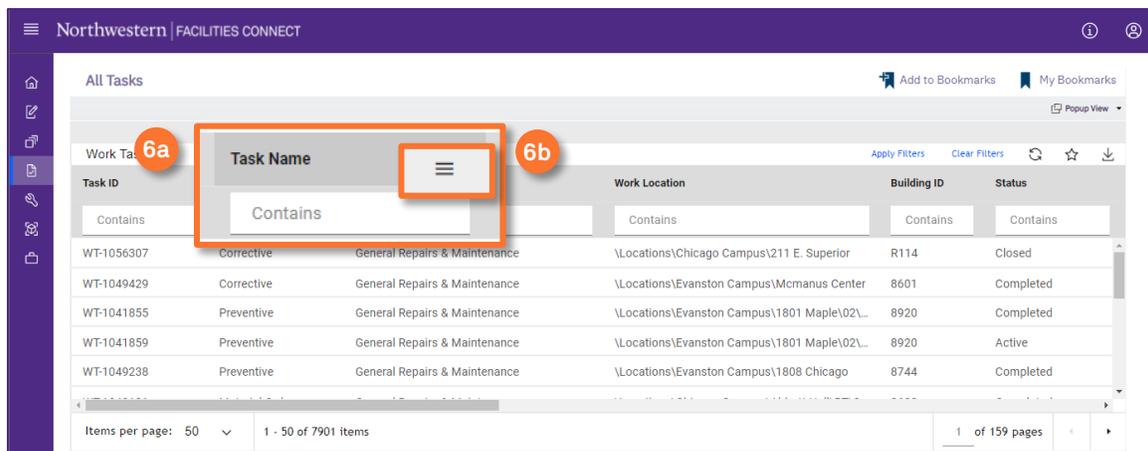
# REPORT FUNCTIONALITY UPDATES 2022

### DIRECTIONS

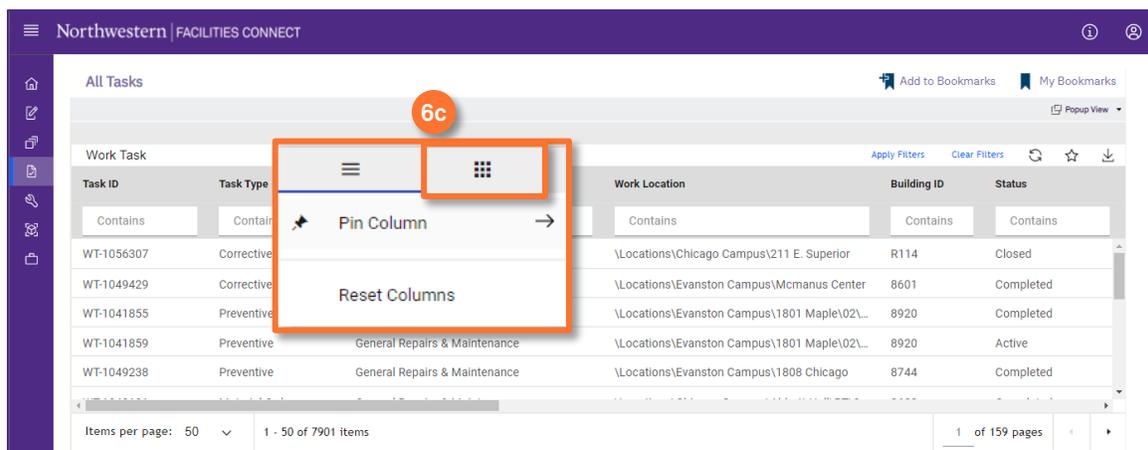
#### 6 New column functionality continued:

##### Remove column(s):

- 6a Hover over any column until you see the three bar menu.
- 6b Click on the **three bar menu**, upon clicking the **drop down menu** will display.



- 6c Click on the **dotted tile**.



#### ▼ IMPORTANT

Any changes you make to a report **WILL NOT** save once you close or navigate away from the report.

## FACILITIES CONNECT REPORTING

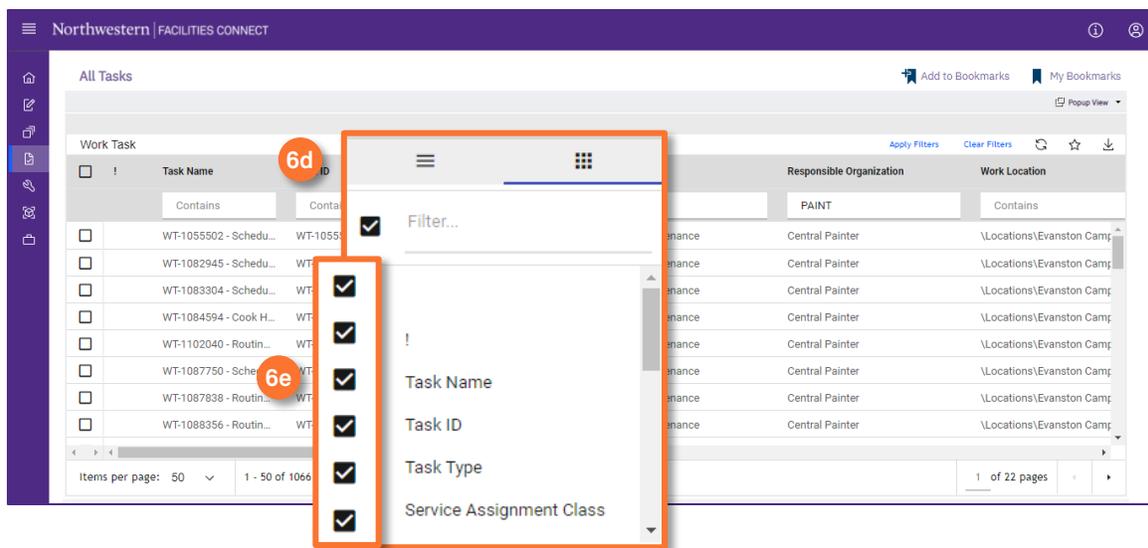
# REPORT FUNCTIONALITY UPDATES 2022

### DIRECTIONS

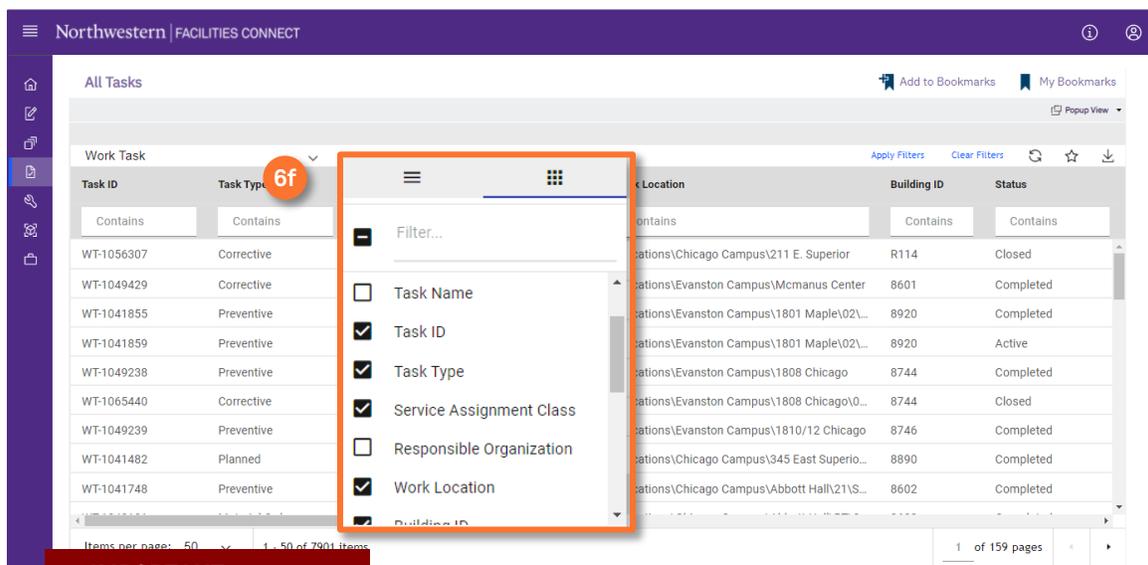
**6** New column functionality continued:

Remove column(s):

- 6d** Upon clicking, the **column list** will display.
- 6e** Use the **checkboxes** to deselect any columns you want to remove.



- 6f** The columns will disappear from the report as you click the checkbox.



#### ▼ IMPORTANT

Any changes you make to a report **WILL NOT** save once you close or navigate away from the report.

## FACILITIES CONNECT REPORTING

## REPORT FUNCTIONALITY UPDATES 2022

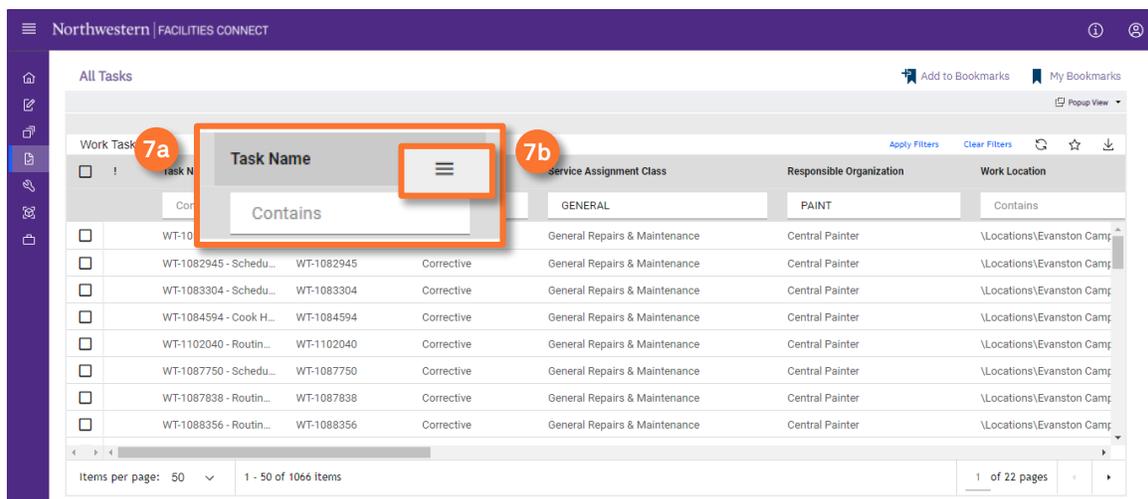
## DIRECTIONS

**7** New column functionality continued:

**RESET** column(s): To reset any columns you moved, pinned, or removed:

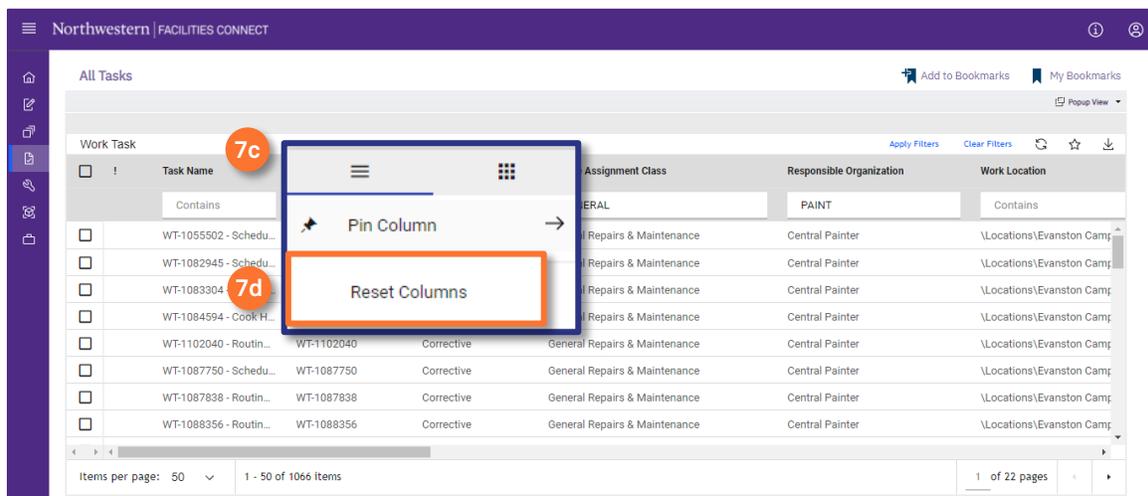
**7a** Hover over the column you want to pin until you see the three bar menu.

**7b** Click on the **three bar menu**.



**7c** Upon clicking the **drop down menu** will display.

**7d** Select the **Reset Columns** option.



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### DIRECTIONS

8

*New column functionality continued:*

**Clear Filters:** Will **delete** any changes you have made to the report and set the report back to **default**.

8

Click the **Clear Filters** option on the right hand report navigation bar.

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All Tasks

Work Task

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization
WT-1055502 - Schedu...	WT-1055502	Corrective	General Repairs & Maintenance	Central Painter
WT-1082945 - Schedu...	WT-1082945	Corrective	General Repairs & Maintenance	Central Painter
WT-1083304 - Schedu...	WT-1083304	Corrective	General Repairs & Maintenance	Central Painter
WT-1084594 - Cook H...	WT-1084594	Corrective	General Repairs & Maintenance	Central Painter
WT-1102040 - Routin...	WT-1102040	Corrective	General Repairs & Maintenance	Central Painter
WT-1087750 - Schedu...	WT-1087750	Corrective	General Repairs & Maintenance	Central Painter
WT-1087838 - Routin...	WT-1087838	Corrective	General Repairs & Maintenance	Central Painter
WT-1088356 - Routin...	WT-1088356	Corrective	General Repairs & Maintenance	Central Painter

Items per page: 50 | 1 - 50 of 1066 items | 1 of 22 pages

9

**Bookmark Reports** to save them for easy access:

9a Click the **Add to Bookmarks** button at the top of the report.

OR

9b Click on the **star** button (located on the report navigation bar).

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All Tasks

Work Task

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization
WT-1055502 - Schedu...	WT-1055502	Corrective	General Repairs & Maintenance	Central Painter
WT-1082945 - Schedu...	WT-1082945	Corrective	General Repairs & Maintenance	Central Painter
WT-1083304 - Schedu...	WT-1083304	Corrective	General Repairs & Maintenance	Central Painter
WT-1084594 - Cook H...	WT-1084594	Corrective	General Repairs & Maintenance	Central Painter
WT-1102040 - Routin...	WT-1102040	Corrective	General Repairs & Maintenance	Central Painter
WT-1087750 - Schedu...	WT-1087750	Corrective	General Repairs & Maintenance	Central Painter
WT-1087838 - Routin...	WT-1087838	Corrective	General Repairs & Maintenance	Central Painter
WT-1088356 - Routin...	WT-1088356	Corrective	General Repairs & Maintenance	Central Painter

Items per page: 50 | 1 - 50 of 1066 items | 1 of 22 pages

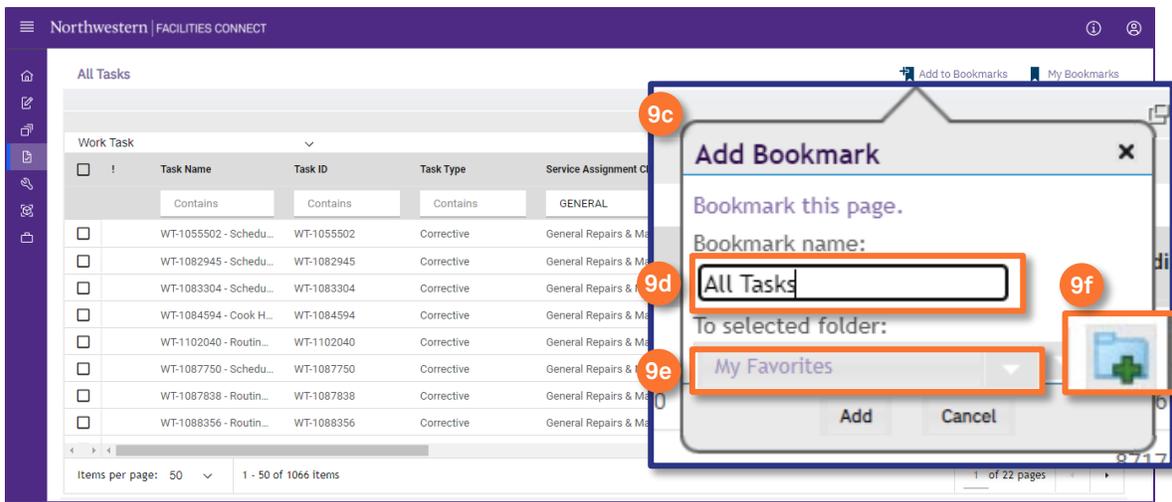
# FACILITIES CONNECT REPORTING

## REPORT FUNCTIONALITY UPDATES 2022

### DIRECTIONS

#### 9 Bookmark Reports *continued*.

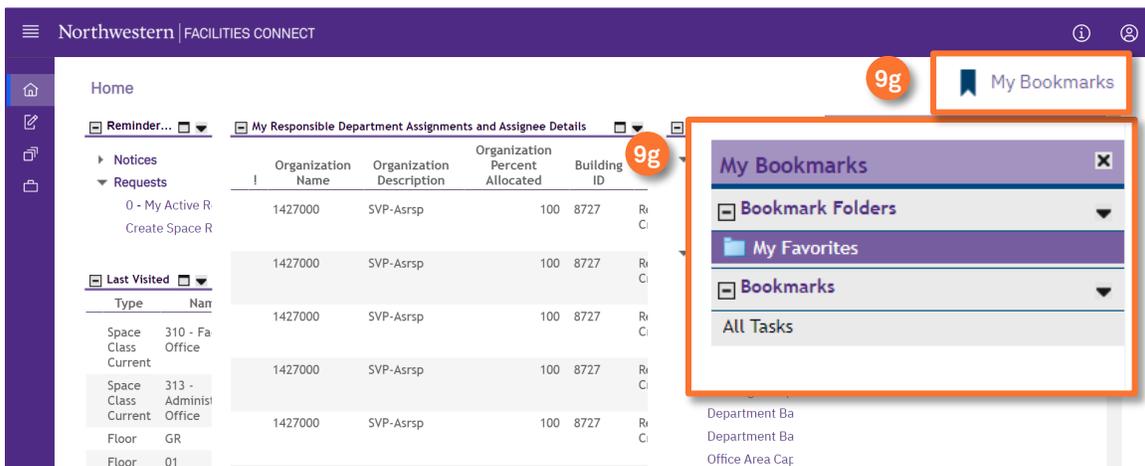
- 9c Upon clicking either button, the **Add Bookmark** window will pop up.
- 9d You can adjust the name of the report.
- 9e Click the folder drop down menu to select a Favorites folder.
- 9f Click the add button to create a new Favorites folder.



#### ▼ IMPORTANT

Bookmarking the report **WILL NOT** save any changes you have made to the report.

- 9f Click on the **My Bookmarks** button to see the saved reports.



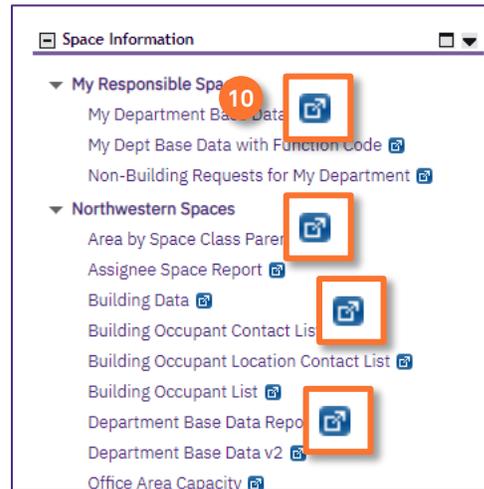
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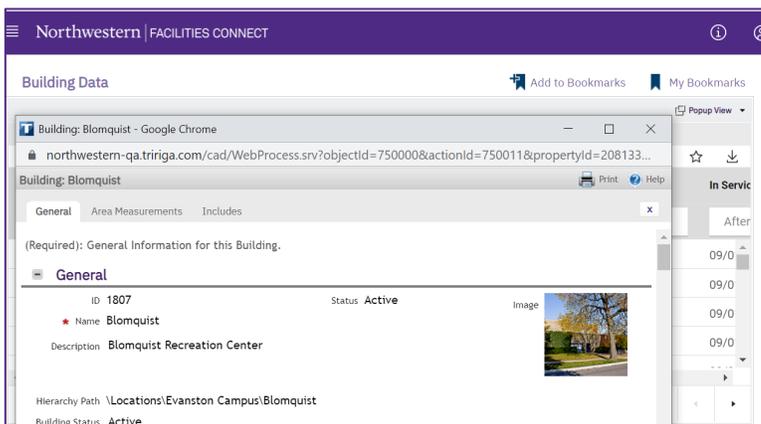
### DIRECTIONS

**10** To open a report in a **new tab**:

**10** Click the **blue button** next to the report name.

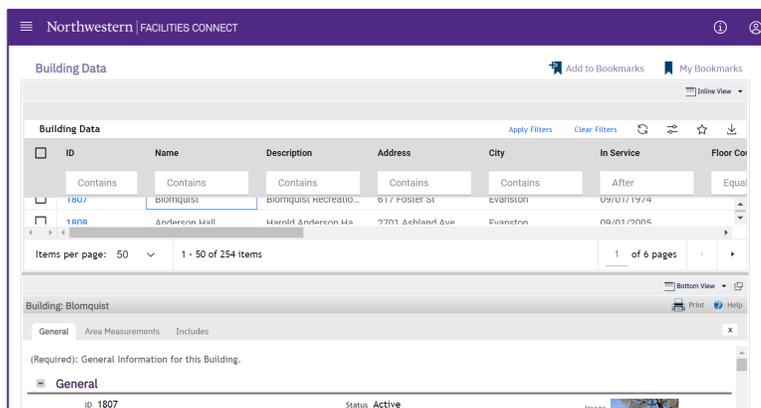


**11** **Popup view vs. Inline view:** you now have the ability to choose between Popup view and Inline view when opening Records in reports.



**Popup view:** opens the record in a new window.

This is the default view for users.



**Inline view:** opens the record within the same report window.

You can then choose to open the record in a separate window.

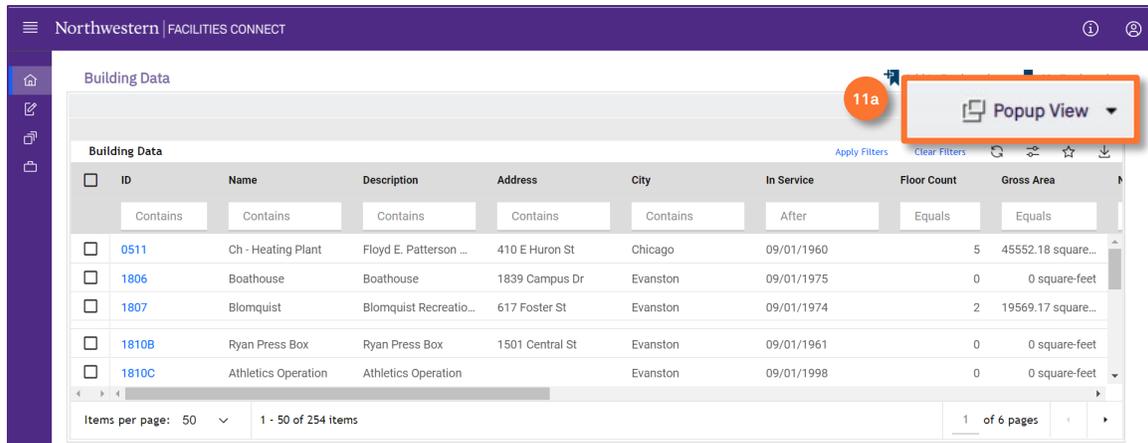
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### DIRECTIONS

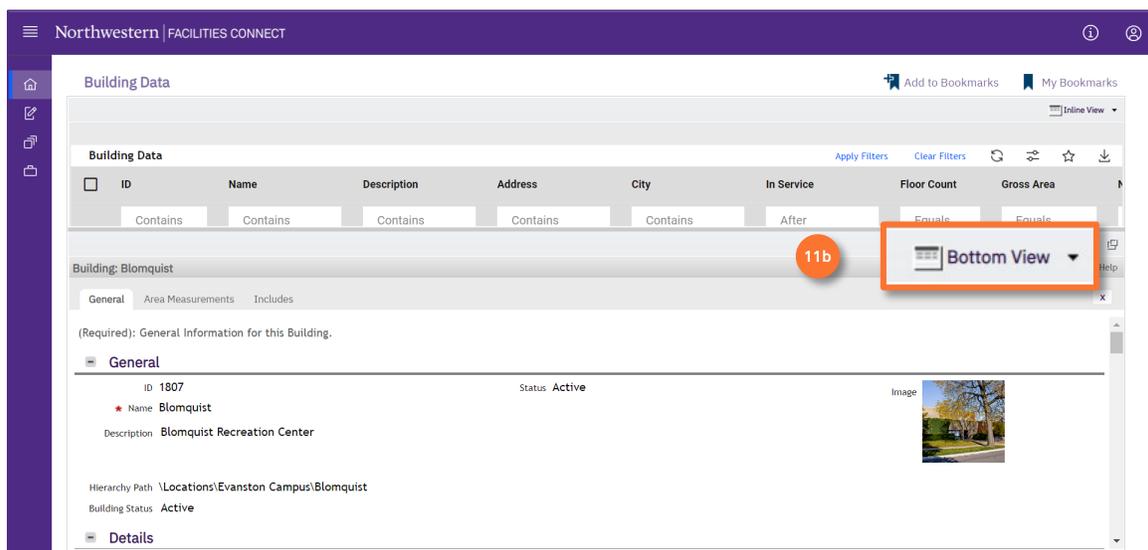
**11** To change from **Popup view** to **Inline view**:

**11a** Click the **drop down arrow** next to the **Popup view** button.



Once you have selected a record, the record will open in a **Bottom View**. To change the Inline view:

**11b** Click the **drop down arrow** next to the **Bottom view** button.



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### DIRECTIONS

**11** To change from **Bottom view** to **Right view** (continued.):

**11c** From the drop down menu, click the **Right view** button.

The screenshot shows the 'Building Data' page for 'Blomquist' in 'Bottom View'. A dropdown menu is open, showing 'Bottom View' and 'Right View' options. The 'Right View' option is highlighted with an orange box. A callout '11c' points to this option.

ID	Name	Description	Address	City	In Service	Floor Count	Gross Area
0511	Ch - Heating Plant						
1806	Boathouse						
1807	Blomquist						
1808	Anderson Hall						
1809	Trienens Performan...						
1810	Ryan Field						
1810A	Ryan Ticket Building						
1810B	Ryan Press Box						
1810C	Athletics Operation						

The screenshot shows the 'Building Data' page for 'Blomquist' in 'Right View'. The 'Right View' option is highlighted in the dropdown menu. The main content area shows detailed information for the building, including its name, description, and various metrics.

ID	Name	Description	Status
1807	Blomquist	Blomquist Recreation Center	Active

Legal Name	Common Name	Parking Spaces (Open)	Parking Spaces (Covered)	Tenure	Building Class	Headcount	Headcount (manual)	Zoning
Blomquist Recreation Center	BLOMQUIST	0	0	Owned		0	0	

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### DIRECTIONS

**12** To open the **Record window** from Inline view:

**12** Click on the **maximize** button.

The screenshot displays the Northwestern Facilities Connect interface. At the top, the header reads "Northwestern | FACILITIES CONNECT". Below the header, there is a navigation sidebar on the left and a main content area. The main content area is titled "Building Data" and features a table with columns: ID, Name, Description, Address, City, In Service, Floor Count, and Gross Area. Below the table, there is a section for "Building: Blomquist" with tabs for "General", "Area Measurements", and "Includes". The "General" tab is active, showing fields for ID (1807), Name (Blomquist), Description (Blomquist Recreation Center), and Status (Active). A red circle highlights the maximize button in the top right corner of the record window.